

Roger P. Gimbel's

# GUIDE TO BETTER BUSINESS

A compendium of  
industry insights from  
Gimbel & Associates

**Gimbel & Associates**  
GEARED TO YOUR **SUCCESS**  
400 Garden City Plaza  
Suite 405  
Garden City, New York 11530  
646-472-1936  
[www.rogergimbel.com](http://www.rogergimbel.com)

Copyright © 2020 Gimbel & Associates. All rights reserved.

No part of this publication can be reproduced in any form or by any means without prior written permission from Gimbel & Associates. Gimbel & Associates makes no guarantees about the expected outcomes that may result from the use of the enclosed recommendations.

# **Roger P. Gimbel's Guide to Better Business**

**A compendium of industry insights from  
Gimbel & Associates**

**April 2020**

## **Introduction**

Gimbel & Associates (G&A) is an international management consulting firm working to ignite business growth in the graphic communications industry through digital technologies. As an independent company, G&A offers clients customized consulting services to achieve their sales, marketing, and productivity goals.

Print Service Providers must learn to survive and thrive in a new reality after COVID-19. Now is the time to assess your current business model, your changed customer needs, and the way that your customers want to do business with you. You will need new strategies. Peruse this body of knowledge and experience and find ways you can positively impact your business.

## **Acknowledgement**

Gimbel & Associates gratefully acknowledges and thanks the following contributors to this series of articles: Randall Swope and Allison McCord.

# Table of Contents

Business Strategy .....	1
Preparing for the Rebound: Crisis Management is Operational. Recovery Planning is Strategic. Why not do both?.....	2
Creating Success – Business Development to Generate Added Value to the Customer ....	7
Finding Your Way through the Maze with Focused Diversification .....	11
Growing Your Print Business Through Mergers .....	14
Business Partnerships Can Lead to Business Success.....	18
Are You Making Enough on Print?.....	21
Is Your Pricing Strategy Working? .....	23
What Does Mobile Have to Do with Print? .....	28
What Will Drive Your Revenue the Next 3 Years?.....	31
Inkjet – How to Decide What’s Best for Your Business .....	33
Printing Industry Trends for Marketers and Designers .....	35
Marketing Your Business .....	39
Social Media as a Marketing Tool.....	40
Want to Really Engage Your Customers? Host an Event! .....	43
How to Run Effective Customer Events.....	45
How Do Your Customers See You? .....	50
10 Marketing Strategies for Printers .....	53
Sales Acceleration .....	55
Value Propositions that Work.....	56
How to Shift Sales to a Value-Focused Approach.....	59
Becoming a Strategic Partner for Print Services.....	61
Are You a Partner or an Order-Taker?.....	65
Getting to Yes .....	67
How to Switch to Solution Selling.....	71
Customer Journeys for Business Expansion .....	75
Know Your Customer and Their Needs.....	77
Understanding Vertical Markets.....	81
Postal / Print & Mail.....	85
An Easy Way to Connect Print and Digital .....	86
Making More Money with Mail .....	88

What’s Next for the USPS .....	91
Postal Regulations That Trouble Print Companies .....	94
Talent Acquisition & Development.....	97
Future Employees .....	98
Automation Won’t Solve the Print Industry’s Staffing Challenges.....	100
Enhancing Your Communication Skills.....	102
Are Your Conversational Habits Helping or Hurting? .....	105
Powerful Production .....	109
Can Legacy Applications Jumpstart Your Inkjet Success?.....	110
The Gimbel & Associates Going Forward Guide: Creative and Production.....	113
Is Data Quality Your Responsibility? .....	116
Data Security Challenges in Your Print Environment .....	118
The Gimbel & Associates Going Forward Guide: Marketing and Data.....	119
Why is Data Still a Four-Letter Word? .....	122
Wide Format for Transactional Printers? Not as Crazy as it Sounds!.....	124
Questions Printers Wish Designers Would Ask .....	127
Gimbel & Associates Alliances .....	129
About Roger P. Gimbel.....	130

## Business Strategy



- Are you focused solely on getting the “daily laundry” out the door each day?
- How much time and energy do you spend on business planning for the next week, month, year or several years?
- Are you considering strategies to protect and grow your business in rapidly changing business conditions?

COVID-19 has changed every aspect of our lives in 2020. New strategies are needed for the new realities. This section describes some ways you can make shifts to protect your business today and in the future.

## ***Preparing for the Rebound: Crisis Management is Operational. Recovery Planning is Strategic. Why not do both?***

*Originally published in April 2020*

As we enter the second month of the pandemic, businesses are faced with critical decisions regarding how to manage short term operational actions while ensuring preparedness for the return to normalcy. Printers have been hit hard. Business has been disrupted by:

- The closing of many of their customers' businesses;
- Customer budget cuts due to business downturn; and
- The increased need for doing business remotely.

These factors will have an ongoing impact on the printing business.

Some segments of the printing industry, such as packaging, are surviving as Essential Businesses, but their requirements and product mix are changing. For example, the milk industry has had to shift production away from small cartons for schools and increase production of home-sized cartons. The demand for long shelf life milk is growing as people stock up for ongoing isolation. Companies with a pulse on their customers' businesses will foresee these kinds of changes and adapt.

Printers offering direct mail services are seeing a downturn as businesses close. The next horizon is to support remote selling that combines direct mail with web marketing. During the COVID-19 crisis, there are still opportunities and some new pockets of growth. Keeping your pulse on your customer, providing expertise and new ideas on how to integrate direct mail with remote selling will help differentiate you from the competition and provide a value add to your customer and your community.

One of the long lasting effects of the current shift to doing business remotely is that customers will adopt new buyer behaviors that will last beyond the crisis. How is your company planning to address these changes? What new or expanded solutions and processes can you provide to capitalize on the behavioral changes?

These questions may not have specific answers, but they underscore the need for strategic planning during the crisis. Finding the time for strategic planning may seem impossible given the immediate need for management to focus on short-term survival. Managers are trying to address health, human resources, payroll, logistics, and operational issues that the stay-at-home restrictions have caused. Sick leave, lost talent, reduced support from partners, and a myriad of other issues are taxing on management time and brain power. Not to mention what happens if the virus affects the managers who literally hold the keys to the business.

Let's break this challenge into a few key areas to focus on during this or any crisis:

### **Don't Panic. Act, Don't React!**



Reactionary decision-making may resolve a current problem but create multiple future issues, causing medium- and long-term negative impacts on your business. What's called for is decision-making that balances short-term versus medium- and long-term needs. Of course, immediate actions are needed to address changing customer requirements and business operational issues. But be aware that the snap decisions made today may seem unwise in light of new information that will be available tomorrow. Work with your customers to build a plan of action, including

recovery planning for when your customer's business returns. Look for alternatives, including print-on-demand to address reduced volumes and improved inventory management to reduce costs.

### **Teamwork – Learning from the Crisis**

Teamwork is essential, even while practicing social distancing, Working together is more important now than ever, whether working remotely (customer service and sales) or working on the shop floor, using social distancing and wearing masks and gloves. As part of your strategic planning for the rebound, encourage your teams to give you feedback on how to better serve customers in a "virtual" business world and how to meet the unique customer requirements that were identified during this crisis. Many of the process improvements you make now will be worth keeping in place when business returns to its future normal to save money, enhance customer engagement, and grow your business.



## Assess Product Mix



Demand for some products will decrease, and for others it will increase during the crisis.

This will be all the more true after the recovery starts, when your customers' needs will include:

- Pent up demand;
- Low inventory of critical items; and
- New business processes.

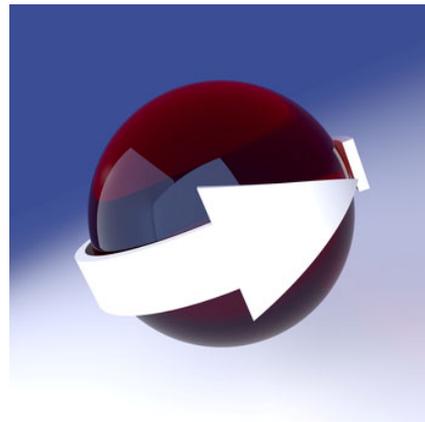
In many cases volumes will go down, so the shift to print-on-demand may accelerate. Gearing the production floor to focus on high-demand items that may be in a state of flux is critical. Flexibility, response time, and integrated support for delivery will become more important than ever.

Another challenge is how to foresee and adapt to the coming changes in product mix. For example, some segments of direct mail will see a huge opportunity for growth as companies try to recapture business and integrate with more intense remote buying. Schools have gone remote and will require new solutions over the coming months that will most likely be incorporated in longer-term educational models.

## Rejuvenating and Revamping Marketing and Sales

Many companies have to rethink their sales process as social distancing limits customer visits. Many customers are working remotely; others have closed because they are not designated as Essential Businesses or don't have a business model conducive to remote work.

How are you responding to the need for customer contact without in-person meetings? Hopefully with strong customer relationships you have been able to transition into remote sales activities and support.



Keeping your sales team focused and involved is critical during this period. While furloughs may not be avoidable, you must weigh the value of the customer relationship with your sales team and keep the relationships intact as much as possible. When sales are down, sales teams that depend on commission to survive will have major issues in meeting financial obligations. Guaranteed minimums, when possible, can be a good solution until sales rebound. Maintaining benefits like health insurance and retirement is also an important way to avoid losing sales talent. Investment in people is the most important investment during a crisis.

When conditions make it necessary to furlough sales people, make sure you have a plan for re-boarding and recuperation. Be aware that this may be a key moment for high value sales people to be plucked out from under you. Find ways to shift sales duties to support production or other logistical areas and customer support. A short stay in customer service may be a valuable experience for sales resources. In the end, it costs much more to replace critical resources.

### Now for the rebound!

To assume that it will be business as usual is a huge mistake. Part of your strategic recovery plan should include sales strategies and marketing support that focus on the immediate opportunities while addressing customer behavior changes that may have been caused by the crisis. Review your sales process and sales data to see which customers are prime for recovery and have the greatest pent-up needs. Some customers may take longer to revive but your sales presence during the initial recovery period is key to ensure loyalty. Customers will long remember how your business helped them recover. Another part of the recovery strategy is to include marketing actions to support the sales team in delivering the message to the customer and building programs and promotions to stimulate a return to the new normal.

Here are some key considerations that will help you to form a strategic recovery plan while focusing on the daily operational challenges during the crisis.

- **Assure your customers that you are here to help them.** You'll solidify your customer relationships by communicating that you empathize with their situation and are ready to work with them to build a recovery action plan.
- **Personalize this communication to each** company rather than using generic mass messages. Make the customer see that you are speaking directly to them. Personalized email and direct mail are the best approach. Draw on standard themes of managing in the current crisis, but then customize your message to the specific customer and their relationship with you. This communication will not only be useful for delivering a strong message to your customer, but it also provides a model for what they can and should be doing with their customers. Don't be surprised if some of your customers give you a call to request for help in sending similar messages to their own customers. Use what you sell!
- **For VIP customers, a phone call from your senior team to their senior team is of utmost value.** Don't short cut the sales team relationship, but build on it and reinforce that your company is committed to supporting them now and when the recovery is in full force.

Taking care of your Today Business includes focusing on the Future Business. You will find new opportunities from crisis, but only if you are prepared.

Blessings to all and please be safe!

## ***Creating Success – Business Development to Generate Added Value to the Customer***

*Originally published in November 2017*



The future of the graphic communication industry continues to be debated at all conferences, events, and in many publications. Industry leaders, consultants, and service providers are searching for the formula for success and how to succeed in a new paradigm. Advances in digital technology, new workflow technologies, variable data software packages, print processing, and the integral role of the internet are completely transforming the way providers of graphic communication services meet the needs of their customers.

In the past, printing was the main product. Now, graphic communication companies must offer value-added solutions, such as design, data management and analysis, fulfillment, and tracking and measurement services. Investing in additional capabilities is an important decision for owners and executives.

Technology alone solves nothing without a well-defined business strategy that considers the following:

- Customer markets
- Main applications
- Competition
- Organizational skills
- Financial analysis
- Workflow
- Printing technologies

Unfortunately, many graphic communications companies spend most of their time evaluating technologies, but spend little or no time documenting a clear strategy. Too often, the focus is on the struggle to protect the business rather than looking for ways to expand. The main challenges that companies must address in a business strategy are:

- Declining traditional print volumes
- Reduced margins for traditional printing
- Transformation of Information Technology
- Integration of multiple media

- Constant content changes
- Non-traditional competition

To face the competition and expand the business, companies need to understand that the business is not about printing, but about communications. With this in mind, they need a strategy focused on the business of the customer, not the business of printing, which requires a broader perspective.

Customer Service	Increase Revenue	Reduce Costs
<ul style="list-style-type: none"><li>• Maximize cross-sell / up-sell</li><li>• Develop new customers</li><li>• Measure the effectiveness and ROI of marketing campaigns</li></ul>	<ul style="list-style-type: none"><li>• Treat each client in a unique way</li><li>• Increase customer loyalty and retention</li><li>• Make relevant messages reach the right customer at the right time</li></ul>	<ul style="list-style-type: none"><li>• Control customer communications costs</li><li>• Manage multiple communication channels</li><li>• Improve productivity</li></ul>



Technological advancements are transforming the world of communication. There is a wide array of media and distribution channels for consumers and businesses to receive and share information. Printing must be part of a broader communication plan, integrating content to various media, from web, mobile technology, e-mail, social media, video, online advertising, electronic billboards, and

more. The most successful companies are offering services and support in areas well beyond printing.

The traditional communication models are being rapidly supplanted by a paradigm in which the end user decides where, how, and when to receive information. In this new reality, companies that rely solely on traditional methods will not survive.

The new approach involves:

- Targeted communication with greater relevance
- Focus on the customer, not the product or service



- Multi-channel integration
- Measuring results

However, the traditional concepts of creativity, innovation, continuity, and quality of product and service remain fundamental to a successful methodology of communication.

Where are companies focusing on communications investments? Where are the business opportunities? Which applications should have the greatest growth? Various studies show that the predicted growth of digital print is good among all categories of applications, led by books on demand and direct mail. Promotional material categories also show good growth. They are increasingly integrated with added value including special substrates, customization and personalization of materials, and transforming catalogs or manuals into direct marketing communication.

Another strong trend is the use of the web for order and payment management. Web-to-print technology is transforming the way printers are integrating workflow to their customers. While standard web-to-print is a commodity, the way it can be applied strategically to customer needs can be visionary.

The business plan should formalize the organizational strategy. The profile of future leaders needs to include skills to create these strategies. Today's leaders and key employees require additional knowledge and skills, along with expert advisors who understand the importance of making investment decisions for success in the future.



The graphic communications sector will continue flourish if these five critical areas of business development effort are considered:

- 1. Business Plan.** Graphic companies must have a business plan for the future that supports their business and marketing objectives. Many companies lack the time and expertise to do so. Nor are they in the habit of seeking specialized advice in this regard.
- 2. Associations.** Graphic industry associations should integrate efforts with their members to create policies, tools, programs and incentives for business development.
- 3. Talent Development.** Graphic service suppliers should include talent development programs for both their channel partners and their customers as part of their business development strategy.

**4. Higher education.** Colleges and technical schools institutions should create and integrate programs for the future of the graphic communication sector, using alliances with graphic companies, service providers and associations.

**5. Public sector involvement.** Government should stimulate and support new investments in education and development, with incentives and budgets, to prepare of future talent; the graphic communications industry needs to take part.

There is no doubt that the future of the printing industry is promising, and there are reasons for print providers to continue investing in expansion and diversification. However, without business strategy and the commitment of everyone involved, the investment will not realize its full potential. Defining the fundamental knowledge and skills required, identifying future talent, and investing in the development of employees in new methods and processes are just as critical as technology investments. Industry experts can provide objective advice on all aspects of a business strategy and can contribute to the achievement of business success.



## ***Finding Your Way through the Maze with Focused Diversification***

*Originally published in April 2018*

There is a lot of buzz in the Graphic Communications press about the challenges the printing industry faces. Most opportunities are for digital print, as the demand for offset continues to fall. Electronic documents are replacing print from transactional to books to promotional pieces. Some experts claim that even the concept of digital replacing print is old news. The millennial generation is directing their future, and new ways of going digital are yet to come. Smartphone users with Smart watches hardly look at their phones any more. For millennials, email is as antiquated as parchment paper. So where is the opportunity for print?

Consolidation of the major players, along with acquisitions and closings has changed the landscape of the industry. Planning for growth is a major challenge for print companies of all sizes. Some key areas for growth are built around digital technology – packaging, direct mail, and large format are always at the top of the list.

Book printing may not be as obvious an opportunity to some, but billions of pages of offset book printing are destined to transition to digital using inkjet technology. The problem facing many small and medium printers is that their capabilities don't fit into many of these growth categories or they have not made the required investments in digital printers and workflow to be competitive.

So what do you do if these growth areas are not in your wheel house? First, if you haven't adopted digital printing, it's not too late. Second, if you are a "do-it-all" type or "I-only-do-this" type, it's time you reassess your strategy, define a clear focus for your business and diversify. Yes, you need to focus and diversify at the same time, which may sound like a contradiction. Within your focused strategy, you need to identify multiple yet complementary customer and application markets to build your business.

The biggest challenge for small and medium sized printers is having a clearly defined strategic vision. Small and medium printers often started in the business through family ties or as small entrepreneurs building off skills in production, sales, distribution, or design. They built their business by identifying opportunities and capitalizing on them through operational excellence. The real challenge for their future is staying relevant to their customers and finding new customers. Too often they lack the staffing, technology, and capital resources to do so. Decisions about growth are even more difficult yet critical to the success of their business.

As consultants to the Graphic Communications industry, we often encounter the dichotomy of operational excellence and strategic failure. Whether due to complacency or an exclusive focus on operations, owners and executives of printing companies do not

devote enough time and energy to business strategy. Focusing on the strategic direction of the business requires commitment. First, you have to schedule management time away from the daily operational challenges, and then maintain an ongoing process for measuring and revalidating progress and direction.

**Building a strategic focus consists of the following major components:**

Strategy	Questions to Ask
Business Strategy	What is the business direction that you want for the company? What are your high-level objectives? You may have different objectives for areas such as Marketing/Sales, Operations/Production, Finance, and Organization.
Marketing Strategy	What are the elements of the business that will enable you to achieve the desired objectives of the business strategy? (Customer, Product, Place, Price, Promotion)
Sales Strategy	What is the coverage strategy that will best support the marketing strategy? Examples include: Customer focus, application focus, direct sales, channels, or partners, etc.
Production Strategy	What hardware, software and processes are required to produce and deliver the solutions to your customer?
Organizational Strategy	What people resources are needed and what partnerships are required to deliver the business?
Financial Strategy	What is the optimal way to capitalize the business and manage for profitability?

Address each piece of the strategy in sequence and at a level of detail that provides clarity for the business. Although some opportunities may arise in the normal course of business, it is becoming increasingly difficult to rely on the status quo, hoping that a “Big Deal” will come along.

So, how do you engage in Focused Diversification? Build a strategic vision, have management commitment to spending time “ON” the business not just “IN” the business, and create opportunities instead of waiting for them to happen.

**Do a quick checklist of your current state:**

- ✓ Do we have a defined written business strategy?
- ✓ When was the last time we assessed our capabilities versus weaknesses? For example, by completing a SWOT Analysis
- ✓ How much exposure do we have due to one or two major customers driving our results?
- ✓ Are we tied to our technology instead of our customers?
- ✓ If we were to start over, what would we do differently?

Before you can diversify, you need to understand where you are today, then identify the market opportunities that align with your core capabilities. Try doing a matrix analysis of Customer Market x Application Solutions to build a map of where your core capabilities lie. Overlay that against the major market opportunities you defined in your business strategy. For example, if you are strong in variable data, you can use that to identify complementary customer segments, and new applications that require data competency. If you are strong in the automotive or insurance segments, you can use that strength to identify complementary customer segments that use similar applications. It is important to build from a strong base and expand your reach using your core competencies. Diversification requires focus so that you don't reach beyond your capabilities; at the same time, diversification means building new competencies in the focused areas that you choose.

If you would like to start the conversation around these questions, contact Gimbel & Associates.

## **Growing Your Print Business Through Mergers**

*Originally published in July 2018*



The printing industry landscape for all sizes of companies has been changing dramatically over the last 20 years, with a huge shift from offset print to digital print. Recent advances in inkjet technology have enabled the digital production methods to move into longer run volumes, consuming even more of the traditional offset market.

At the same time, demand for traditional offset applications has declined due to major increase in the use of electronic documents for promotion and advertising. The one offset application that continues to grow is packaging, but it is also under pressure by digital print advancements.

Commercial printers with a strong dependency on traditional offset applications have been faced with major strategic decisions involving investment in digital technology, merging with or acquiring a digital company, or selling the business and calling it quits. For digital print companies looking to grow, the challenges of making these moves organically can seem daunting. In either case, the option of mergers and acquisitions can provide a path towards growth and competitiveness.

While the larger print companies have legal and strategic resources, and the capability to hire specialized consultants for analyzing mergers and acquisitions, small and medium print companies may find it daunting to make these types of decisions. The major concern is often protecting a life-long personal investment of money, time, sweat and tears while ensuring that a secure future.

An interim or alternative approach to mergers and acquisitions is to find partnering opportunities that will expand the value of the products and services a company offers. Companies can often grow their business more quickly and cost effectively by establishing strategic partners that fill the gaps they may have when compared with competitors. Examples are traditional offset printers partnering with digital printers or with fulfillment companies, and engaging in strategic alliances with providers of value-added services such as design, data processing, and mail. The objective is to find ways to better meet a customer's needs and offer differentiated services than what competitors can offer.

A drawback of partnerships is that they are typically transactional for some limited projects and may not offer the guarantee of continuity needed to build a successful structure for growth. Mergers and acquisitions provide a more solid foundation with more control over strategic investments and decisions.

## Interview with Roger Gimbel



Roger Gimbel, President and owner of Gimbel & Associates shares his 35+ years of experience in the print industry, which includes owning a print company and implementing several mergers and acquisitions directly and for clients.

**Interviewer:** Roger, there has been a lot of consolidation in the print industry over the past 20+ years including both large companies merging and buying up smaller companies. What do you think is the current climate for mergers and acquisitions in the small/medium print segment?

**Roger:** On the acquisition side there is a lot of opportunity for mid-sized printers to acquire smaller printers and combining that with organic growth. Smaller printers do not have as many possibilities to sell as mid-size companies do to buy. It's a buyer's market. It's more of a get out of business approach for small printers. There are a lot of competitive businesses that it's a tough area to sell your company and make money.

**Interviewer:** Do you see mergers and acquisitions as a viable strategy for growth?

**Roger:** The opportunity clearly exists for merger opportunities as an advanced form of partnering for companies that have complementary offerings. Hardware, software, web offerings are a few of the areas. A good example is a strong commercial printer merging with a digital printer to gain both hardware and know-how to expand into the digital print space.

Expertise is a factor in all deals stemming from unique customer applications, workflow capabilities, etc. Partnering is an arrangement where "I would like to work with you" whereas merging is "I have to work with you" as the companies become one. The partnering can be non-exclusive. Mergers and acquisitions involve joining ownerships that are designed to make the relationship durable.

**Interviewer:** What are the major benefits of a mergers and acquisition strategy?

**Roger:** The major benefits include:

1. Faster growth
2. Competitive Face-off
3. Access to technology resources
4. Access to people resources/know-how
5. Services that couldn't be offered cost effectively otherwise

6. Economy of scale for purchasing (for example, paper); more saving on workflow, purchases, and headcount.

**Interviewer:** What cautions or concerns do you have?

**Roger:** There are several key concerns that include:

1. **Many printing companies hide revenues** – you need to be able to discern what the real value of the business is. You also need good accounting and legal analysis to evaluate merger and acquisition candidates. Third-party experts can help.
2. **Compatibility of the Executive Team** – make sure the senior team has a shared vision and style. Typically in a mergers and acquisitions scenario the leadership team is made up of resources from both parties. Too often while the goals of the two companies are compatible, the management style and processes are not. Initial discussions need to include understanding and agreement on the management approach.
3. **Due diligence must be conducted on candidates.** There is often a specific target company for the merger and acquisition. However, don't limit the search to the first, and often the only one, you know. It's human nature and tempting to see something you like and go after the deal, but this is a major strategic and long-term impact decision. Take the time to assess and compare alternatives. By comparing you will better evaluate the value that your target candidate has to the business.

**Interviewer:** How should a company approach evaluating candidates for mergers or acquisitions?

**Roger:** There are several major steps that I take when looking at candidates.

1. Make a list of requirements. What are the "Must Haves" and "Nice to Haves"?
2. What strategic area for growth is being targeted and how does the candidate fit into this scenario?
3. What type of company to acquire/merge to complement? Signage, inkjet, fulfillment, etc.? Who to look at based on strategic direction/intent?
4. What are the key attributes that will be the best complement?
5. Set a clear strategic plan that documents the vision, objectives, and structural elements of the new company.
6. Consider that contractual relationships with customers are more valuable than transactional relationships.

**Interviewer:** Can you elaborate on your top five considerations in mergers and acquisitions project?

**Roger:** There are so many considerations; however, I would categorize the top five as follows:

1. **Finances.** How has the company been doing over the last three years? Debt? Is there growth?
2. **Opportunity.** What are you going to get out of the deal? Size? \$15M + \$10M becomes \$25M?
3. **Integration.** How difficult to integrate? Family involvement? Unions? Stockholders/multiple owners?
4. **Technology complementary position.** What improved capability does the new company have merging the technology capabilities? What can be consolidated? Back office merged? One web solution? Admin? Production Management?
5. **Reputation of the merger partner.** The image of the partner will carry over to the new venture. It is important that this image supports the objectives of the new company.

### Summary

The past experience of the print industry with mergers and acquisitions has shaped a more competitive market, with fewer but stronger players. As companies seek to expand, they will need to combine a strategy of organic growth with mergers and acquisitions. We will see a continued consolidation of the print industry, with current players expanding their customer base and building new capabilities. Companies that are best positioned to do this are those with strong leadership resources and the financial health to support the merger and acquisition process.

## **Business Partnerships Can Lead to Business Success**

Originally published in February 2018



As the Graphics Communication Industry increases in complexity and the consolidation of companies continues, the independently-owned print company faces significant challenges. They need to retain high-value customers, diversify business, and maintain relevancy. The majority of print work is controlled by a small group of large

companies, mostly through consolidation. The number of medium and small printers continues to dwindle. According to PIA there were approximately 25,000 in 2012 and which has dwindled to about 15,000 today.

The independently-owned print company has typically succeeded through strong customer relationships built on providing quality, reliability, and flexibility in print solutions at competitive prices. They have kept pace with technology through focused acquisitions of new print equipment and upgrading workflow solutions to enhance productivity and providing value-add solutions.

The biggest challenge for most independently-owned print companies is resources to keep pace with the changing landscape in the graphic communications industry. Three areas are increasingly important:

- **Data Management**
- **Creative Services, and**
- **Multi-Channel Communications.**

Most independent print companies are not well-positioned to build capabilities in these three areas due to both human and capital resources. Capital resource limitations often restrict the acquisition of resources or companies that can bring these skills into the mix.

One solution is to form strategic partnerships with specialized providers, without giving up independence or the relationship with the customer.

Partnering with companies that have these specialized skills should be a core pillar of the business strategy for independent print company owners. Collaboration and teamwork bring unique challenges including different working cultures and power struggles. However, the alternative is to become increasingly irrelevant in this increasingly complex industry.



## Data Management

This is probably the most difficult area to build internal skills and yet also difficult for partnerships since owners of data processing companies are very protective of their customers and their systems. But the opportunity for partnering can work both ways. Print companies with data processing capabilities can partner with print companies that do not have these skills to develop new customers and new solutions. Instead of trying to be a one-stop-shop for all data and print services, they can diversify by offering data services to printers whose customers can benefit from data-driven solutions.



Printers that have no data processing capability but have strong customer relationships and own core communications solutions of the customer can identify a like-minded company with data processing capabilities to build new value-added solutions. Clearly, protecting the customer relationship is key because, as they say, “whoever owns the data owns the customer.”

Start with a small pilot project with a loyal customer and a value-add solution using the know-how of the partner. In the pilot, both companies will uncover challenges but also opportunities.

## Creative Services

According to some estimates, creative agencies own up to 80% of all print. Developing partnerships with small creative agencies that are looking for ways to expand their business with new creative print services, yet do not want to invest in the infrastructure of print, can be a good opportunity for new revenue sources.

Some print providers may be inclined to select one agency and become their printer of record. There are limitations to this approach as it reduces the potential of working with customers that already have their own creative provider, or limits the creative offering.

Bringing the creative capability in-house in another option, but it presents some unique challenges. It can be useful to have a skilled designer on staff to interact with customers and external creative agencies, but as more jobs are secured, this resource will quickly become saturated. The pre-sale activities and production role of the creative person are time consuming.



Building a network of creative partners for design and copy, photo, and web is the best approach. Creative services providers and print services providers can also bring customers to each other, and can work strategically to develop business new to both.

## **Multi-Channel Communications**

The world of multi-channel marketing is the new frontier for many print companies, yet all too overwhelming for many. Technology providers will insist on software solutions to build capabilities for multi-channel integration; however, it is much more than just a software or workflow challenge. Engaging in a customer's multi-channel marketing activities is to become involved in that customer's strategic marketing communications. It's not just creating a job quote and having the technical capabilities to deliver on the print, distribution, and complementary fulfillment. Strategic relationships with the customer and partnership in the building of the marketing communication strategy as it is integrated into a multi-channel strategy are required.

Print companies often work with their customers' purchasing department and perhaps with department heads such as Marketing and Sales for value-add solutions. But with a multi-channel solution, the key contacts are IT and Marketing. The sales process is oriented to projects or programs, not individual jobs. These ways of doing business are often new to a print company, or at least not in their comfort zone. By partnering with companies that specialize in multi-channel marketing solutions and that have a more strategic engagement with program and project management skills, the independent print company can bring new solutions to their loyal customers, integrate and fulfill print solutions in the mix, and learn core skills to build the business for the future.

Customers are not always looking for one-stop-shopping for all their communication needs, as they understand different players bring different skills to the table. However, when a trusted provider presents an integrated approach built around key partnerships in which they participate, differentiation and additional value are created. This helps protect loyal customers, and grow the business with them and with new customers.

### **What needs to change?**

First and most important is the fallacy that independence breeds control. In this case, independence may actually be the major cause for loss of control. Secondly, building partnerships is a full-time effort. The owner and senior team need to be fully committed, and resources need to be dedicated to developing and managing the partnerships. Building partnerships is a great example of how owners and senior managers can invest time "working on the business instead of just in the business."

## Are You Making Enough on Print?

Originally published in April 2017



Printing companies operating without a Management Information System (MIS) are flying blind.

It is easy to tell if a print operation is making money by looking at profit and loss reports. Not so simple is finding the information that management needs to make decisions such as determining how much work they can add before purchasing new equipment or when to hire more people. And recognizing the point to adjust pricing for individual jobs or accounts is nearly impossible without a system to capture job level data and generate cost analysis reports.

In many shops, job cost data from the production floor is randomly collected and rarely reviewed. Making the task even harder, many shops use separate, unconnected processes to handle estimates, order entry, job scheduling, postage deposits, time tracking, inventory, and billing. Employees manually copy information generated by one software system into another, leading to errors and omissions. Real time data is unavailable, rendering informed daily production adjustments impossible.

In environments where managers cannot compare job-level costs to budgets or estimates, changing conditions or inefficiencies can make it possible to unknowingly lose money on jobs—and do it repetitively.

Incidents during a workday can increase costs or cause printers to under bill their customers. A cushion built into the pricing may cover an occasional operational problem, but chronic issues on repetitive jobs can eat away at profitability. Unless printers have a workflow and MIS system that captures job level costs, they may never be aware of revenue and profit loss by job and account.

### Causes of net revenue decreases

Here are common scenarios that can stealthily decrease net revenue:

- A service provider quoted a customer job assuming 98% of the mail would be machine-inserted. Later, customer format changes increased page counts, causing a larger portion of the job to exceed the letter-folding capacity of the machines. Inserter operators walk portions of the job over to the handwork crew for manual inserting into flats. Excess labor cost for hand insertion is not tracked.
- A change in customer-supplied files is causing operators to slow the production equipment. Labor for this part of the document production has increased to 150%

of the budgeted amount but lack of tracking means the account team doesn't know.

- Estimators use an Excel spreadsheet that has no intelligence. When account representatives fail to include a service on the estimate, or the shop adds services after quoting the job, the account is under billed.
- An estimator computed a customer's postage charges based on 5-digit presort levels, but declining volume has resulted in most of the mail qualifying at higher, 3-digit rates. If the shop never adjusts the calculation for billing, they have reduced their profit margin on postage.
- Sometimes jobs come in late and miss the deadline for transporting mail to the presort vendor. Employees meter mail pieces at full rate and deliver the mail to the Post Office, but never notify the front office. The shop fails to bill for the excess labor and postage.
- A warehouse staffer finds a job jacket from six months ago hiding behind some new inventory items. The billing department never billed the customer. It would embarrass the shop to invoice the customer now, so they write the job off as a loss. With insufficient checks and balances, such events could repeat.

### **Is your workflow working to drive profits?**

Commercial software solutions and Management information systems (MIS) can help shops connect front office operations with production floor labor cost and statistics. Application programming interfaces and industry standards like JDF or XML make it possible to collect data from the variety of systems installed in most shops. MIS systems can streamline the workflow and collect all the relevant data in a single database with hand scanners for manual steps in the process. From there, printers can run reports that will help them see where to adjust pricing or be able to spot correctable workflow inefficiencies.

These tools may also include rules administration functionality that prevent costly quoting mistakes or issue alerts when something isn't going as planned. Printing companies who operate without an MIS system are flying blind. As jobs become more complex featuring variable data, personalization, and multi-channel distribution, accurate and accessible job cost information becomes even more critical in a digital world. Is your workflow working to drive profits?

## Is Your Pricing Strategy Working?

Originally published in January 2018



Of the 4 P's of marketing: **Product, Price, Promotion, and Place**, the most difficult to define and manage is pricing, because it is both a science and an art.

How does your company approach its pricing strategy?

- Do you focus more on the traditional cost plus profit margin? If so, do you know what your actual costs are?
- Or do you research the local competitive market and try to beat the competition's price to win business?

These are the two most traditional and common approaches to pricing strategy for printing companies. The former provides a sound financial business approach to pricing that is easy to define and ensures profitability to the company; that is if you sell anything. The latter certainly provides a more strategic approach to pricing, however, lowering price only wins when the competition decides it's not going to lose money. By that time you too are probably losing money. Clearly these two strategies for pricing are used by the majority of companies in the print industry, but how can you change the game to the benefit of your bottom line as well as to the growth of your business?

**A three-pronged approach to pricing is the key to successful competitive positioning in addition to addressing customer requirements and benefits.**

### Value Pricing

The first step to pricing is to understand the customer requirements and what they need to do to win the business from their customers. Too often, companies try to sell what they make versus make what customers will buy. It's especially common in the print industry since many companies are focused on production instead of the customer.



Understanding value pricing is to understand customer value. Instead of asking, “*What printing needs to you have?*” start with “*What are your customers’ major pain points and business opportunities?*” When asking about printing needs you are destined to enter a discussion of price early on. Start by determining the value proposition of your customer so that you can:

1. **Offer the appropriate solution;**
2. **Design and communicate the value differential of your offering;**
3. **Position your offering versus competition;**
4. **Respond to customer objections.**

Successful print providers help their customers understand the unique benefits of print communications, how to get the greatest return from their investments in printed material, and how to integrate print and digital media to raise the effectiveness of all the media channels.



Focus on how customers benefit from your services so they will think of you as a strategic partner rather than a vendor. Shifting sales conversations away from production-related specifications such as print volumes, finishing, and paper stocks will help you move the pricing conversation away from how much it costs to the value of the solution. Value-added discussions should be about business goals such as conversion rates, customer retention, upselling, lifetime customer value, and customer experience.

When talking with customers skeptical about print's value in a digitally-oriented world, stress these points:

- According to consumer surveys, direct mail is the most acceptable form of unsolicited communication. It's often the gateway to establishing a digital connection with customers.
- Marketers who abandoned printed materials are adding items such as targeted catalogs back into the strategy. The printed pieces are remarkably effective at driving consumers to online or retail stores.
- Over 90% of consumers retrieve and review their mail every day.
- Physical mailboxes with direct mail pieces that stand out with color, shapes, personalization, or other features provide a clear advantage over marketing efforts delivered only to overcrowded web browsers and packed email accounts. Each piece of mail must be physically handled; it can't be deleted with a mouse click.

## Educate Your Customers

You may need to educate customers about the ways print has evolved:

- Digital printing enables short runs of highly personalized and targeted content.
- Codes in the address block allow mailers to trigger precisely timed complementary digital messages, based on actual postal delivery dates.
- Interactive elements such as QR codes, PURL's, near field communications such as RFID, and augmented reality connect printed materials to the digital world.
- Geo-location data can control the inclusion of maps or driving directions to physical locations. Smart marketers also use this information to adjust the value of coupons or offers, attracting more distant customers by offering greater savings.
- Print service providers now coordinate direct mail with follow-up email, drip campaigns, landing pages, or automated fulfillment to support customer lifecycle relationships.

Finally, you can overcome perceived objections from customers about the cost of print versus electronic alternatives.

- Digital printing and data analytics make it more economical to target smaller audiences. This saves on the cost of materials and postage and improves campaign ROI by filtering unlikely respondents from the mailing lists.
- Personalization increases response rates by crafting messages, images, and offers to match the demographics and buying history of each person on the list.
- Postage cost savings can be achieved by co-mingling mail together to maximize postal discounts, using intelligent mail barcodes to qualify for discounts, or timing the direct mail campaigns to coincide with USPS promotional programs.

## Margin Pricing (Cost plus margin)

Your financial department will want to calculate the margin of the offering to ensure that profitability targets are being met. Set profitability targets, but keep in mind that the true measure of success is not Gross Margin but Gross Value.

A cost plus margin mentality leads to a focus on cost cutting when actually increasing the costs may be the solution. When greater value is created, higher margins can be sustained since better business results can be achieved.



Say your management team wants to increase prices 5% across the board. What will be the impact on sales, revenue, and profitability? Too often this approach is short-sighted when the real opportunity is in providing more value to the customer, and achieving potentially higher margins and certainly higher revenue and absolute profit. This differentiation will help you manage the inevitable question “Can you beat the price of the competition?”

When positioning on value versus cost in the pricing model, you can often increase the margin even while increasing costs, which any financial officer will appreciate. The margin calculation should be an analysis of the pricing, not the way the price is formulated.

### **Competitive Pricing**

In the world of print commoditization, a price leadership strategy certainly can appear to be the only way to survive in the printing industry. However, lowering price is never a long-term strategy. There will always be others who are willing to sell even lower. Price erosion and low margins are just the surface issues. The real problem is that there is no consideration of value creation for the customer. That said, you need to consider the competitive scenario as one of the three prongs for your pricing strategy.



By understanding and analyzing competitive pricing you can set the parameters of your own pricing. A thorough analysis of cost structures, productivity opportunities, and workflow simplification/automation can help to improve your costs. In competitive pricing comparisons you need to explain how your product/service is differentiated and how it provides more value to your customer.

Print quality and service dependability are certainly key factors, but today they are table stakes to get in the game. You need to include other elements such as specialized media, data services, security, and marketing/creative support. The focus needs to be on the communication strategy of the customer and not on the cost of printing.

Pricing versus competition on the printed piece is always a sub-optimal approach. Pricing on programs that include ongoing relationships can lead to a better overall competitive positioning and often better pricing and margins. Clearly, there will be situations where you just need to offer price. The customer who is shopping around may buy this time, but they may not be a repeat customer, or you may not make money working with them. It's okay to accept some of these jobs, but as a business strategy it will limit your growth opportunities. When a customer asks for a price on a job they almost certainly already have a competitive reference price. If you say \$.15 a page and they have a proposal for \$.12 a page the discussion may end there. Make sure the discussion does not stop with price comparison. Value-added selling is the counter to such requests.

## **Summary**

Transitioning to value-added selling isn't easy. It requires a different sales approach and technique; the cost per piece to print is not as important as the results of the investment in print. Speak with decision makers and stakeholders, not just procurement people.

Expecting a sales staff to immediately shift to a more consultative-type approach isn't realistic. Focused, skill-based training is often needed for salespeople to master new skills to sell value-added services to marketing and C-suite decision-makers. Under the pressures of day-to-day operations it is difficult to focus on training. You may not have the internal knowledge and resources to provide adequate and continuous development for value-added selling. Specialized consultants can play a vital role in building and delivering the training and complementing in-house management for ongoing development of the sales process.

## What Does Mobile Have to Do with Print?

Originally published in April 2019

Mobile technology is revolutionizing entire industries. Sometimes it even creates something new, like ride-sharing services. Uber wouldn't be possible without mobile phones. The printing business can take advantage of what mobile has to offer as well. Mobile technology isn't the only factor causing changes in the printing business, but it creates possibilities for printers to create new billable services and deepen relationships with clients.



Smart phones and tablets enable exciting developments happening in the printing business. Mobile barcodes (QR codes), near-field-communications (NFC), and augmented reality (AR) all take individuals into the digital realm from a point that starts with a printed document.

These technologies offer far-ranging possibilities. Printers have barely begun exploiting the capabilities and more importantly, to sell the concepts of mobile-enabled print to their customers.

### QR Codes Regaining Popularity

QR codes should be familiar by now. When they first became popular printers rushed to include them in marketing campaigns, sometimes with poor execution. Use of the codes dropped off, but have resurged somewhat after Apple included a QR code reader as part of the iPhone's camera system.

Apple's move eliminated the biggest drawback to QR codes—requiring users to download an app, start it, and wait until it was ready to scan. Unfortunately, Android phone users don't have a built-in QR code reader, so their experience with the technology has not changed.

QR codes send users to mobile-optimized landing pages, videos, product details, the mobile app store, and more. Printers must include the destination as part of the code. Testing is critical to ensure consumers can scan the codes and they lead to the desired web locations. QR codes work well in direct mail or on posters and flyers. Be sure clients will display the printed materials in areas where consumers have mobile access to the internet.

## Tapping into Near Field Communications (NFC)

NFC is the technology that enables the “tap to pay” applications that speed checkouts at retail locations, but printers can affix NFC tags to printed materials, allowing print to communicate with smart phones. Applications might include posters advertising an event. By approaching the poster with a phone, customers could watch promotional videos or movie trailers, buy tickets, or register for a conference. A phone connected to marketing materials featuring NFC tags might download a white paper or lead to a landing page on the web. NFC tags on flyers or brochures could set up appointments for free consultations or download an app to the phone.

NFC tags come in various sizes. The antenna (a thin coiled wire imprinted on the tag) allows the tag to connect with a smart phone which powers the tag. Smaller tags mean shorter antennas so users must place the phone very close to the tag to have them connect. Test various sizes and tags from different manufacturers before going into full-scale production.

Unlike methods that use a phone’s camera for initiating a next step, NFC doesn’t require phone users to download a special app or find the right lighting conditions to allow the phone to read encoded data. As long as the phone is NFC compatible the function is always active.

## Is it Real, or is it...Augmented?

Augmented Reality requires an app on the smart phone. Once installed a user points the phone’s camera at a printed piece. When the phone recognizes the printed image, it overlays the static image captured by the camera with a digital layer. The AR app can direct users to web pages, show them videos, play animation, or allow users to interact with content in a variety of ways.



The great thing about AR is it will work on materials you’ve already printed. Scanned images contain no special characters or hidden codes. Printers supply an example of the image for the AR app to recognize, possibly long after they produced the documents. Applications could include signage, marketing materials, menus, or even transactional documents like bank statements or insurance claim reports.

Unlike QR codes, images that trigger AR experiences do not detract from a printed piece’s appearance. An AR app can recognize fine art just as effectively as a jumbo postcard.

If you are using the mail to deliver pieces containing NFC or AR technology, check out postal promotions that discount the postage by 2% during the promotional period. You

must sign up in advance. See more information about postal promotions at <https://postalpro.usps.com/promotions>.

### How Mobile Technologies Change Client Relationships



Mobile-enabled technologies allow printers to have meaningful talks with their clients about helping them achieve their business objectives. They take the conversations away from a focus on paper and ink and allow printers to talk with their clients about what comes next. Print becomes the gateway to the most valuable piece of the project instead of the ending point of the discussion.

Talking with clients about these new techniques will be awkward until printers gain experience with them. The best way to get familiar with QR, NFC, and AR is to use them on your own campaigns. Buy some NFC tags and see how they work or contact vendors in the AR space and plan a pilot project. Try out QR codes on your next direct mail campaign.

In-house projects will also help you determine your costs and pricing. We don't recommend printers use mobile technologies as a way to sell print. Don't give them away. They have great value and should be sold as such. The printing business is changing and part of the transition includes leveraging new technologies that help clients attract leads, improve customer experience, or retain customers. Get involved and add mobile technologies to your customer presentations.

## What Will Drive Your Revenue the Next 3 Years?

Originally published in June 2019



There's little doubt that printing companies are seeking opportunities to take the infrastructure, knowledge, and customer relationships they've cultivated over the years and apply them to new market areas. Surveys by organizations such as the Specialty Graphics and Image Association (SGIA) and Printing Industries of America (PIA) indicate such moves are key components of

many print company strategic plans.

[PRINTING United](#), an industry conference, has emerged to address this convergence of printing categories.

Commercial printers are looking at packaging, sign printers are interested in textiles, and transactional printers are investigating wide format.

Although a strong background in one printing genre doesn't guarantee success in adjacent markets, basics like high quality standards, deadline observance, and customer relationship skills provide a solid base. Companies can grow as they explore ways to produce new printing products and provide new services.

### Data is Part of the Strategy

Nearly all companies are looking at data services and deciding how they can add value to the products they are already producing for their clients. Personalization takes many forms, from explicitly printing customer-specific information on documents to using customer data to affect the messages, offers, timing, delivery channels, or document design.

Printing companies can help their clients use their data or augment and enhance that data to improve the effectiveness of the messaging they produce for them. Coordinated campaigns utilizing print plus digital delivery channels are an area where printing companies can create new revenue streams based on existing products.

### Printing Technology Creates Opportunities

Digital presses can place images on a wide variety of substrates and printers can connect their presses to many finishing components. Color management and calibration has

become more automated in the digital print world making it easier to match corporate colors on materials produced on different devices. Printers can transition into some of these other printing areas without the financial risk of investing in expensive new equipment before they have signed the business to support it.

Signs, interior décor, wraps, and other graphic arts projects that expand a commercial printer's typical collection of products can enrich a printing company's bottom line. These products generate high profit margins even when produced with short runs. Instead of stagnant or declining volumes, markets for new products commercial printers add to their portfolios are growing.

The market for wide format is expanding at a rate of about 11%. Many printers have noticed this trend and are contemplating purchases of roll-fed, flat bed, or hybrid wide format printers along with cutters that allow them to create custom products they sell to enthusiastic buyers. Or they are seeking partnership arrangements to do the wide format work while they develop a stronger customer base. Some have found market niches for wide format products allowing them to reap the benefits of repeatable processes they can automate.

### **Leveraging Customer Relationships**

An existing customer base can be a lucrative source of business when printers venture into new print products. Many printers have discovered their customers already used items such as banners or internal signage. They were just buying it from someone else. Leveraging their customer relationships, printers can bring that work into their shops.

We'll be reading a lot more about convergence in the printing industry over the next few years. At Gimbel & Associates we're advising our clients to watch for new opportunities and be prepared to act when the time is right for them.

## ***Inkjet – How to Decide What’s Best for Your Business***

*Originally published in March 2020*



Nearly all printing companies have by now pondered the idea of adding digital inkjet devices to their production floors. Top performing companies have already made the move, and it’s paying off for them. Over 50% of the top 50 U.S. print providers on the Printing Impressions 400 list are running production inkjet presses. 75% of them are experiencing revenue growth. It’s no wonder that

inkjet is so popular, but printers have lots of choices when they decide to invest in an inkjet press. How do you know which one is right?

There’s no single answer that applies to everyone. An astounding number of variables will affect this decision for your organization. For now, let’s consider some of the most common scenarios that guide a print company’s decision about inkjet press acquisition.

### **Objective**

What do you want to accomplish? More personalization, faster production, expanded capabilities, reduced operating costs, workflow efficiency, consistent color, and economical small print runs are goals cited by many companies. Once you define the most important aspects of inkjet printing for your company, you’ll have a way to compare devices and technologies.

### **Vendor Points of Differentiation**

You can buy inkjet presses from a variety of vendors. Just as important as what you buy is the company from which you will buy it. Training, sales development and marketing assistance, service, and other customer support will likely influence your decision.

### **Web or Sheet-fed?**

This inkjet decision is straightforward. If you’re planning on running lots of high-volume jobs that use the same paper stock, and if productivity is a priority, feeding the paper from a roll is the way to go. Shops that work with a wide variety of papers or anticipate smaller print runs should look into the many cut-sheet devices now available from several vendors.

### **Finishing Considerations**

Unless you are planning a total production floor makeover, the inkjet press you buy must emit materials compatible with your existing finishing equipment. Paper stock plays a part here too. Test the paper your new press will require, ensuring it also works on all your

finishing equipment. Note that if your finishing lines work with cut sheets and you're buying a continuous roll-fed press, you must plan for an extra step to turn the rolls into sheets. The cutter will probably be integrated as part of the press, which will increase the footprint on your floor. Your warehouse space requirements will change, and you'll need wider aisles to move the paper rolls around the shop. Be sure there's enough room!

### **Looking for Answers**

Don't make such an important decision in a vacuum. Talk with several vendors, read everything you can find on devices under consideration, and attend trade shows or visit vendor demo rooms. Check out the Inkjet Summit conference. Network with members of your trade associations to get feedback about their inkjet experiences. Visit sites where the proposed equipment is installed to observe the presses in operation.

An often overlooked resource is your own customers. Let them know about planned equipment upgrades and nail down their minimum requirements. This can be tremendously helpful in trimming the list of presses you will research. Your customer conversations may even uncover new work opportunities for the inkjet press!

Every printing company has a unique mix of customers and jobs. Their local competition varies. Direct mail companies will rank inkjet objectives differently than commercial printers. Take all the variables into consideration and do your research. The vast majority of printers who invested in inkjet are happy about their decisions. It's likely you will be similarly satisfied provided you think through your decisions and take the time to query, compare, and test.

## Printing Industry Trends for Marketers and Designers

Originally published in December 2019

Printing projects start with project design but marketers and designers aren't always up to speed on printing industry developments. Lack of information can cause designers to miss out on exploiting new technologies or create unnecessary expense. Here are some trends and printing operation developments that can affect how creative people design print projects.

### Color Choices and Specialty Inks

Printing presses can create only a portion of all possible colors by mixing their four basic inks; cyan, magenta, yellow, and black (CMYK). When colors must be exact, such as in a corporate logo, printers purchase specialty inks or "spot colors" that ink companies pre-mix to exact specifications. Ink companies create the colors according to the Pantone Color Matching System (PMS).



Sometimes specialty inks are unavoidable. Fluorescent colors and metallic inks are always applied as spot colors, for example. Insisting on specialty inks will increase project costs.

Newer printing presses may include optional additional print stations that could lower the incremental cost associated with specialty inks. Check with the printing company to see about their capabilities.

Color technology development will eventually reduce the need to use spot colors. For now, document designers should acquaint themselves with press functionality and avoid unnecessary expense caused by arbitrary color selection.

### Environmental Sustainability



Environmental awareness has changed the way we produce printed materials. The print industry has been vigorous in efforts to educate, raise awareness, and make substantial changes to inks, papers, and production facilities.

By specifying that printing companies meet certain environmental standards or certifications, designers and marketing professionals can be sure their clients' printed materials align with corporate environmental policies. They must take care to ensure the desired quality can be achieved

with the paper chosen for environmental reasons. Designers must also confer with printing companies to ensure the paper choices are compatible with the presses and finishing equipment.

Here are some prominent organizations whose logos and audits are often referenced in print applications.



Paper manufacturers that source their materials in responsibly managed forests can be certified by [The Forest Stewardship Council](#) (FSC). A chain of custody can trace the wood fibers in paper products to an FSC certified forest.



The [Sustainable Green Partnership](#) (SGP) registers printers that manage their energy use and other facets of their business in an environmentally sustainable way.

Recycled paper is an often misunderstood area. The printing industry works with materials manufactured with varying degrees of recycled content. When designers discuss recycled paper with clients in advance, they can include proper requirements in their printing specifications.



**Recycled:** Paper must contain at least 30% post-consumer fibers. The proportion of recycled content can vary dramatically and still bear the “recycled” label.

**Pre-Consumer Waste:** Paper scraps reclaimed at the paper mill to make more paper.

**Post-Consumer Waste:** Paper that has been processed to remove coatings, ink, and toner.

**Virgin Fibers:** Wood fibers that have never been used to make paper.

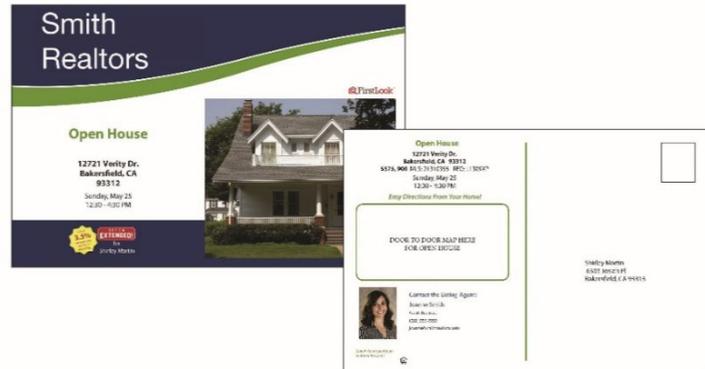
**Chlorine Free:** Paper has been brightened with chemicals other than chlorine.

## Variable Data & Personalization

Digital presses can create highly personalized materials with no impact on cost or speed. Printers can even outfit their offset presses with digital print heads to add personalization as part of the production process. Marketers and designers should understand the personalization capabilities and limitations of the printing operation.

Communication is important when planning personalized printed pieces. Discussions about the data, document composition methods, handling, and delivery will ensure the designer's vision is realized. Poorly designed

personalized print projects can add costs to the manufacturing process and cause delays.



Accurately matching personalized package elements is essential to project success. Markings and identifiers allow for automated matching and package integrity verification. Conversations about matching capabilities and requirements should occur before designs are finalized.

## Stay Up to Date

Communicating with print operations at the beginning of a project will ensure the impending design incorporates all the benefits current technology can provide. Knowledge about the capabilities and limitations of the print provider and their equipment will ensure that design decisions don't trigger unexpected costs in materials or manufacturing. The printing industry is transforming. Constant communication with printing professionals will allow marketers and designers to be abreast of the latest developments.

*A version of this article was originally published on 11-26-2019 at:*

<https://colorkarma.com/featured-articles/printing-industry-trends-for-marketers-and-designers/>



## Marketing Your Business



- Are you a believer in “If you build it, they will come”?
- How much of your business is dependent on just a few longstanding, loyal customers? What conditions may change in your relationships with them, or in their business models that could make or break your business?
- How will your company build familiarity with potential customers in this rapidly changing industry?

This section has ideas to help you make your company stand out among other print service providers. You’ll see how you can be more competitive than ever in today’s marketplace.

## Social Media as a Marketing Tool

Originally published in August 2018



Numerous print services providers are eager to build their social media presence to increase awareness and build the image of their business. The focus is on getting the key team players in the company engaged in social media platforms, which is different from paid sponsored advertising. Many companies engage consultants to define and execute their marketing strategy that includes social media.

### “Be Seen, Be Found, and Be Connected”

A successful social media strategy follows the motto, “Be Seen, Be Found, and Be Connected.” Having the right network members is one way, but also contributing relevant and useful information to your network is important. That doesn’t mean telling them what you are selling. You can do that in a sales engagement. It is more important to gain their awareness and interest in you and your business first.

### The Best Use of Social Media

Companies are looking to social media to complement their customer communication strategy. They want to build their name brand in the industry by connecting with industry leaders, consultants, suppliers, and other influencers in their business.

Sales-driven people may say they don’t have time to waste on social media; they need to be out selling. Social media is not a waste of time if it is an integral component of the overall customer marketing communication strategy. Once you have chosen which social media platforms to start with, you will need to invest some time to maintain your presence in a structured fashion. You will need to develop relevant content, update your posts on a regular basis, check for people asking to connect with you, and ask for connections with people.

Many employees have their own personal accounts on popular social media platforms such as Facebook, Twitter, and Instagram. These personal accounts should remain personal. It is important to set up separate social media pages that represent the professional individual as well as their company.

## LinkedIn



LinkedIn is the predominant professional social media platform, almost exclusively focused on professional content and communication. LinkedIn is an excellent personal branding platform for developing your professional profile in the industry or community.

Key things to include are a brief goal or objective, a short description of accomplishments and areas of interest, and highlights of your experience. Yes, that sounds like a resume. In some ways it is a brief version of your resume, but it not just for job-hunting. It positions you as a professional, shows people the common connection you have, and describes why they may be interested in connecting and staying in touch with you. Keep your LinkedIn presence professional. Don't post photos of yourself in summer beach wear or ski outfits, unless of course you are a lifeguard or ski instructor.

LinkedIn enables you to share relevant information and news that is of interest and that reflects on the contribution you can make. Staying informed and continually learning is a major benefit of LinkedIn. And fortunately, unlike in the other personal social media platforms, "fake news" is not common. Keep politics out of it! That is, unless you are a politician.

## Your Network

Managing your network is important to ensure a positive experience. Too many people start out accepting everyone and anyone. While that may seem easiest, it can become cumbersome very quickly. You may want to start by connecting only with people you know, and then expanding to include their connections. The real gems are found when you connect with people you've never met but who can be positive members of your network both professionally and in terms of business opportunities. Keep in mind that the purpose of networking is to have someone you know introduce you to someone they know, and so on.

Selling is not a major objective of social media platforms. If all you do is sell, or oversell, your network will lose interest in visiting your page. The major focus for professional media platforms is sharing information that is relevant to the audience in your network. If you post about hot topics and comment on trends and important subjects in your field, the people you want to reach will be more likely to pay attention.

## Individual versus Company pages

Typically, LinkedIn pages are for individuals, but they can also be for a company. Both are useful. However, the LinkedIn pages of the employees of your company should be aligned with the overall theme and content of your company. Some may prefer to include other professional interests on their page – ones that don't relate to their current employer's

mission. Aligning the structure and content with the overall company strategy and image can be a very effective marketing strategy, especially with customer interfacing employees. Take a look at your senior team's individual pages. Is there an opportunity to align them better to the company strategy and business objectives? Are they using their social media pages in a proactive way to develop business opportunities?

### **Creating the Link**

For print services providers, social media can be a great way to communicate with existing customers and gain access to prospective customers. When you get a business card a Chamber of Commerce meeting, connect with that person on LinkedIn and begin the relationship in a non-selling fashion. Your contact will get to know more about you, and you can continue a conversation that may build into a beneficial business relationship.

### **How do I get started?**

Social media is a critical tool in the marketing programs of many companies. Unfortunately, too many do not have a structured approach to social media that is aligned to the company's overall marketing strategy. Your marketing department or Gimbel & Associates consultants can help to improve the overall engagement in LinkedIn and other social media platforms.

## **Want to Really Engage Your Customers? Host an Event!**

Originally published August 2018



Customer events and open houses are fantastic opportunities for print service providers to demonstrate new capabilities and engage customers. No other promotional or marketing effort can match the impact of interacting with customers face-to-face at your facilities. You'll have the full attention of attendees

and ample opportunities to show them the benefits of working with your firm.

These carefully planned events also allow you to change notions people have about your company and give you a chance to show off the investments you've made to handle your customers print and digital communication demands. If changing customer relationships is part of your business plan, an open house or similar affair is an ideal way to launch the effort.

As you speak with customers while showing them around your operation you and your staff can demonstrate new ideas and applications. You can share success stories and highlight the talent on your team. This is a chance to re-frame your company as a solutions provider and enabler of business goals, not just a vendor for printing, mailing, and fixing files.

Done right, customer events yield new opportunities. But this doesn't happen by chance. It takes work to pull it off and produce results. Shortcuts don't exist.

### **Small Thinking Yields Disappointing Results**

We have worked with many clients to help them plan and execute events and open houses. At some point, someone usually says *"Can't we just keep it simple?"* They want to limit their preparation to buying some food, planning a presentation, and setting up a tour.

Simply getting a few people in the building should not be the object of your efforts. How does that help your company?

This is a chance to encourage customers and prospects to see your firm in a new light; to facilitate networking and enable your sales and client services teams to elevate customer conversations. You must craft an experience that promotes idea sharing and generates interest in new programs and services. You'll want to attract the decision makers that occupy your customer's executive offices, not just the print buyers. There is no simple

event plan that will create those results. A minimal effort is a sure path to disappointment and frustration.

### **Position Your Firm as a Solutions Provider**

Place customers in an environment where they can network with colleagues. Arrange for them to spend time with staff they don't normally see. Customers are typically willing to share their larger goals and objectives when immersed in a relaxed and non-threatening setting. Creating a comfortable social and educational environment is what a customer event, open house, or facility showcase is all about.

Well-managed customer events lead to conversations with decision makers who recognize your firm can offer them much more than quoted print jobs. An environment where customers can engage with your departmental managers and network with others will often change perceptions about the benefit of working with your firm. Your sales team can engage at higher levels and demonstrate value by sharing success stories and business results your firm has delivered for other clients.

Client service and account managers usually connect with customers by phone and email. In-person events give these staff members the opportunity to bond with clients in person and deepen their relationships in a way that raises their credibility in future interactions. Many sales teams get referrals to higher level decision makers for program-based work as a result of conversations at customer events. These referrals are priceless revenue growth opportunities. Many of our clients credit their customer events for new sales, new applications, deeper client relationships, and engagement with higher level decision makers.

### **Take Pictures and Video!**

Another benefit of running a great event is content creation. During the event, you will be able to capture content in the form of video, pictures, and testimonials. Several of our clients have furthered their marketing efforts with this new fresh content. Event-generated content supports sales follow-up and provides new website content for many of our clients.

Run your event as if you were shepherding an important customer project through your shop. Embrace this approach and you will experience the same benefits many of our clients have seen.

## How to Run Effective Customer Events

Originally published in August 2018



Successful customer events and open houses don't happen by accident. To realize tangible results you will need alignment throughout your organization on event goals, event strategies, and project planning responsibilities. You'll also need a cross-functional team to execute the plan. Everyone (yes every person in your facility) will need to know what you are planning, and your reasons for hosting a customer event. Each employee will have a role before, during, or after the function.

Treat the planning and execution of the event like you would an important customer project processed through your shop. With senior management support and some teamwork you can create great customer experiences and showcase your facility or new technology.

Here are some ideas and best practices that we've developed after decades of helping companies like yours. You can use this list to make sure your next open house or other event generates real, actionable results.

### Planning the Work and Working the Plan

Once top management has approved, the next step in crafting a results-driven customer event is building a team. No one can do this kind of project alone. Assemble an event team that will define tasks, set deadlines, secure resources, and establish budgets. We recommend building a multi-talented team with 4-6 key members. You can add other resources to the team as your project progresses. Eight to ten weeks before the day of the event isn't too soon to begin preparations.

### 11 Steps to Event Success

Our event planning guide lists eleven areas to address. You can break down tasks from these steps and assign responsibilities to various team members.

1. Event goals
2. Content strategy
3. External communication plan
4. Internal communication plan
5. Event budget
6. Data requirements

7. Event logistics
8. Food, beverage, signage
9. Samples, give-a-ways, raffles
10. Networking strategy
11. Clean sweep

### Event Goals

Be clear on the two or three things you want to accomplish through the event. This will set the tone for the entire design and execution process.

How will you measure success? Be clear and concise so you can remind staff in all your departments about what you hope to achieve.



Some of our clients have defined their event goals as:

- Expose customers and prospects to expanded capabilities and new technology
- Engage current and future customers in discussions about new projects/programs
- Demonstrate creative digital solutions
- Educate customers about a specific service or offering
- Build confidence that your company can handle today's customer demands
- Engage prospects in understanding program-based opportunities

### Content Strategy

What content will compel your customers and prospects to come to the event? We recommend educational content and a little fun. To get customers and prospects to leave their offices and take the time to attend, you must deliver compelling and relevant content. Share updated industry information, promote the highlights of your facility tour, or introduce your new capabilities to potential attendees. Customer success stories and teasers about topics covered by your guest speakers can all be effective in encouraging customers to take part.

If you will conduct a raffle or plan to bestow gifts on the attendees, be sure to feature those points in your pre-event communications.

## External Communication Plan



Many of our print service provider clients with digital print capabilities have seen great results when they promoted their events as a cross-media campaign. They combine direct mail, landing pages for registration, and email or SMS follow-up messages – all personalized.

The outbound communications must include images and messaging crafted to create interest and excitement about attending your event. They are also a demonstration of your capabilities to create and execute such campaigns, and their effectiveness. Put plenty of thought into the communication plan and don't cut corners.

## Internal Communication Plan

Print companies sometimes neglect to produce communications to inform the staff about the strategy behind hosting the event. Regular updates should relate your team's progress towards project goals. We recommend a planned series of internal bulletins to ramp up enthusiasm among employees. Meetings with department managers will ensure they fully understand the organization's purpose and objectives. Keeping the managers engaged guarantees participation and acceptance of responsibility for their roles in producing positive outcomes.

## Event Budget

You can run successful events on a moderate budget. The amount you will spend depends on how much you can do in-house. Outsourcing event management services will be more expensive, as will hosting the event outside your facilities at hotels, restaurants, or other venues.

We recommend planning for expenses to include food, beverages, outbound communications, guest speakers, audio, video, promotional products, signage, uniforms, name tags, etc. Managing the budget will enable you realize an attractive return on your investment.

### Data Requirements

Besides the names, addresses, and emails for potential attendees, we recommend gathering data necessary for personalized communications. This may include gathering data like phone numbers, job titles, and vertical markets. You might have stored this information in multiple, unconnected systems and not in a centralized CRM. You may take advantage of outside data sources to augment the data you can acquire from your own databases.



Be sure to review the data for accuracy before producing customer-facing communications. Misspelling a customer's name or company is a sure way to cool down customer enthusiasm.

### Event Logistics

Logistical details include determining where guests will enter the building, where they will park, and who will greet them. You must decide if you will provide an agenda, name badges, literature, or other items when guests arrive. If a tour or demonstration is part of the event, be sure your guests will be able to hear the speakers and move safely about the facility.

Plan for an area where you will serve food and drink, where to store coats and bags, when you should pull names for prizes, and where speakers will make their presentations. Be sure to plan a traffic flow that accommodates late arrivals and early departures.

### Food, Beverage, Signage

A comfortable socializing environment includes food and drink. Tie the offerings into your event theme and consider the time of day or the season, such as serving hot dogs for a baseball-themed event in the summer. Add themed signage to the outside of the building and in each area where customers will stop for a presentation, tour, registration, and rest rooms.

You might include a backdrop reinforcing branding and the event theme while encouraging video and picture taking (and social sharing!). If your company does not have internal capabilities to create signs and banners, you will need to factor in time and budget to get signs produced externally.

### Samples, Give-a-Ways, Raffles

Use promotional products for raffles and prizes. They are an excellent way to create memorable interactions with the attendees and to reinforce your brand. We recommend selecting promotional products that are useful and demonstrate your capabilities.

### Networking Strategy

Coach your sales, client service, and key managers to facilitate networking among the attendees. This interactivity can dramatically contribute to a successful event. Attendees may know only one or two people from your company. We strongly recommend scheduling an internal planning session when the attendee list is nearly final. Allow time for your client service and sales teams to plan for introducing customers to key staff members and other attendees who could find value in meeting each other.

### Clean Sweep

A customer event is often the driver for finally attending to maintenance and general cleaning tasks that are overlooked during busy production periods. Improvements may involve paint, carpet and floor cleaning, tidying up areas where you regularly store materials or supplies, and updating internal signage. Arrange materials and pallets to allow enough space for guests to move from one area to another and brighten the lighting.

### Event Planning Directly Impacts Results

We've helped many print service providers execute open houses and other customer events. When they follow these eleven steps, they tell us the affair differed significantly from those they've hosted (or attended) in the past. Carefully planned and executed events produce results that surpass the typical experience. Follow the plan and you won't be left wondering if the whole effort was worth it.

*"From thought through execution, the Gimbel & Associates consultant made sure our customer event was a huge success. She strategically directed our team with her extensive planning and knowledge on every aspect and detail before, during and after our open house. The event well exceeded all expectations and we realized a much greater result than anticipated."*

*"Gimbel & Associates coached us on how to get the right people at the event and made sure we had great content. Jet Mail got instant credibility when the consultant spoke at our open house about what was happening in the industry. It was very informal yet very informative. Customers and potential customers were extremely pleased that they walked away knowing much more than when they arrived."*

*Edward Kohler, CEO  
John Kohler, CFO  
Jet Mail Services, Inc.*

With clear objectives and purpose, customer events have allowed our clients to forge profitable relationships with their customers. They often add work they would never have known about if not for the focused conversations that happened at the open house. Yes, events are a lot of work. But the rewards are worth it!

## How Do Your Customers See You?

Originally published in September 2019



If you ask print salespeople about the most important things they should bring to a meeting with prospective clients, they might mention items such as print samples, company brochures, or sales pitch slide decks.

Gimbel & Associates interviewed print buyers about their experiences with printing company sales representatives and discovered that many print service providers were using sales approaches anchored in objects like these. Unfortunately, the things that matter the most to the print buyers were often missing from conversations with print service providers courting them for their business.

In our eBook "[From the Other Side of the Desk](#)" we provide printing company executives and their sales teams a rare look at the how customers perceive interactions with the people who came calling on them. The book includes observations from real print buyers as they compare failed sales meetings to successful ones. In doing this research we found large gaps between what the clients were seeking and the experience most print salespeople typically deliver.

The print sales process has changed and client expectations have risen. It is clear print service providers need to re-think their sales strategies and processes. Unless they analyze their approaches, sales team results will wane. In the eBook we suggest tackling the issue from three perspectives: preparation, presentation, and follow-up.

### Preparation

In the past, print salespeople didn't need to prepare extensively before dropping in on a client. The process was simple—show customers what print products you can produce and convince them to buy. Today, the consultative approach to selling requires salespeople be in tune with their clients' business challenges. What are their goals? Who is their competition? What are the obstacles keeping them from achieving their objectives?

Gathering this information requires pre-call research. Much of the data is publicly available. Exact answers to all the questions aren't always available, but salespeople should at least have a good idea about trends in the industries in their clients serve. Social media sites like

LinkedIn, YouTube, and Twitter can also provide clues about the culture and mission of an organization salespeople are preparing to visit.

Preparation also includes being ready for the unexpected. Print buyers we interviewed mentioned cases where salesperson technology failed, salespeople neglected to bring critical samples, or sales representatives could not provide important information the buyers needed to decide about which printers would be good partners for them.

### Presentation

As consumers we've all become accustomed to interactions with companies that use information they know about us to filter their offerings and lead with products and services most relevant to our profiles. Print buyers are no different, yet they reported many instances where print salespeople seemed to have a standard approach for every customer. If they became clients, the buyers felt, the print provider would treat their company just like any other, with no effort put towards interacting with them as unique entities.

Salespeople fall into this trap by doing too much talking and not enough listening. Take the time to ask questions and lead clients to your solution rather than leading *with* your solution and trying to make it fit the client's situation.

The print buyers also noted a lack of professionalism as a negative influence on their decisions about selecting print service providers. Worn, damaged, or dated print samples won't impress them. Straying from relevant business topics wastes their time. Showing up on time with organized materials, an agenda, and a willingness to listen leaves a favorable impression.

### Follow-Up

Everyone follows a sales call with a thank-you email, but it shouldn't stop there. Today, client buying processes are likely to be lengthy. To stay top-of-mind and reinforce the value of working together to help clients achieve their business goals over the long term, send links to pertinent articles from time to time. Comment on articles the company posts on social media. Or leverage pre-call research plus information gathered from your meeting to select relevant case studies and send them to the clients. Add clients to your CRM and marketing automation systems to avoid losing touch. Send targeted and personalized direct mail that demonstrates your company's talents and abilities.

If sales associates made promises during sales calls, such as supplying more information or introducing clients to other resources, be sure to follow through promptly.

Understanding how your prospective clients perceive your salespeople can be a huge competitive advantage if you take measures to correct deficiencies and emphasize your strengths. Start by downloading "[From the Other Side of the Desk](#)". Then get in touch with

us for a customized evaluation of your sales approaches. If your salespeople are relying on print samples and brochures to sell your services, you'll see a big improvement when they re-focus on the client's business needs.

## 10 Marketing Strategies for Printers

Originally published in January 2020



Printers are great at executing marketing programs and delivering results for their clients but not very good at promoting themselves. Marketing can seem time consuming and complex, but it doesn't have to be. It's based on a few fundamentals: know your clients, decide what you want to tell them, and chose the tactics that work best.

Here are 10 ideas to help you get started.

### 1. Know your customers

Any good marketing program starts with knowing your clients. Delve into your data and create profiles of your clients and the potential clients you want to attract. Go beyond the basics and try to figure out what they care about, what they need, and what they expect from you. Client knowledge will help you create effective marketing strategies.

### 2. Refine your message

Decide what you want to tell your clients – marketers call this messaging. Why should clients work with you? Your message can be simple or complicated. You can structure it around general branding or a particular initiative, such as a new large-format division you're opening.

Knowing your customers and determining your message are the two most critical elements of any marketing program. They are strategic steps that will influence the tactics you employ. A consultant at this stage may help clarify your thinking and enhance your Return on Investment (ROI).

### 3. Have an effective website

Develop and maintain an effective website. It doesn't need to have 57 pages, but it should be clear about what you do and how you help clients. Optimize it for mobile access, keep it up to date, and have a strong call to action. Try not to focus on the blistering speed of your presses. Clients don't care.

### 4. Digital Marketing

If your objective is to get your name in front of as many eyeballs as possible, then look at paid advertising on Google and other search engines. You will appear as a sponsored ad right at the top of the list. Remember search algorithms change all the time, so it may be a good idea to put a staff member in charge of maintaining this program.

## 5. Social Media Marketing

You don't need to be on all the social media platforms, just the social sites frequented by your clients. Beyond posting your messages, use social media as a listening device to find out what your customers are saying. Be consistent with your posts and engage with followers. Some platforms will block sales messages unless you pay for them to extend your reach.

## 6. Content Marketing

Deploying content marketing—blogs, videos, e-books, case studies—can be an effective way to establish you as a thought leader in the industries you serve. The key is to be consistent and stick to a schedule. Create content that is valuable, useful, and engaging.

## 7. Email Marketing

An extensive email list of engaged contacts is the holy grail of marketing. You can rely on Search Engine Optimization (SEO) to be found by customers who are searching, but reaching out directly to clients is much more effective. Inform clients about news, new blogs, new techniques, new services, or other information they will find useful. For more transactional emails that reach out to clients at key points in the sales funnel, use one of the CRM software programs available.

## 8. Face to Face Marketing

Get out there and talk to clients or potential clients. Local events and trade shows are great for strengthening connections and making new ones. Conduct an open house or other learning events in your facilities be sure to download Gimbel & Associates' free eBook: [“Making Your Event a Success”](#).

## 9. Direct Mail Marketing

Don't forget direct mail. Studies repeatedly prove it works, especially with younger clients. It cuts through digital clutter, isn't intrusive, and carries a high degree of credibility. It can also showcase your capabilities. Wow recipients with personalized messages, great graphics, tactile stock, eye-popping finishing, or any special effect you want to highlight.

## 10. Merchandise Marketing

Everyone loves free stuff and the options are endless—pens, cups, water bottles, phone accessories, notebooks. Personalizing an item with the recipient's name is even more effective.

Marketing programs come in endless permutations and there are many effective tactics. Don't get lost in the possibilities. If you let client needs be your guide and deliver a consistent message across all platforms, you're already ahead of the game.

## Sales Acceleration



- Does your sales force have the technical skills needed to support evolving technologies in this industry?
- How well does your sales force understand your customers' business needs and challenges in their industries?
- How will you re-gain traction in sales cycles stalled by COVID-19?

Producing great products on-time is not enough if you want to stay competitive. Those are just table stakes in this industry. You can be out-sold. If you want to keep your customers and win new ones, your sales people must be more skilled and more diligent than ever.

## Value Propositions that Work

Originally published in July 2019



Too often print service providers define their value proposition by focusing on their company's capabilities versus what is important to their customer.

A value proposition that works is one that show how you can help your customers address their business issues – it does not focus on your own products and services.

### Typical Value Proposition

*We are a full service print provider offering state of the art digital print technology and a broad array of finishing solutions to do any job that you need. We deliver quality and on-time results. Our customers work with us because they trust us.*

This typical value proposition does a good job of stating what the company does and why customers work with them, but it is really a capabilities statement. It assumes that all customers are the same and that they will understand their needs can be met by the generic capabilities of the company. This type of value proposition comes from a sales approach that tells the customer what the company offers versus understanding the customer's business issues.

If a sales person's first question is "What are your printing needs?" ... the quick answer will be high quality, low price, and on time. Then the sales person dives into explaining all the newest print technology they have that will provide quality and how they guarantee on-time delivery, while avoiding a discussion of pricing. But the customer will ask, "How much?" The sales person then starts showing samples and might even give the customer some references. The next statement from the customer will often be, "Well, I have another meeting scheduled, so thank you for your visit."

### What is a value proposition that works?

A value proposition that works focuses on value to the customer not the description of what the company offers. And tailoring the value proposition is a key element of consultative selling versus transactional selling of products or services.

- The value proposition is not a slogan.
- The value proposition is not a tag line.
- The value proposition is a clear representation of how you bring unique value to your customer, and it is specific to the business issues of the customer's role.

### How to get to a relevant value proposition?

The key to delivering an appropriate value proposition is having an understanding of their business upfront, and then gathering more details through discovery meetings.



Get your customer talking about their business, their industry, and the challenges they face. Listen! Take notes! Avoid the temptation to eagerly interject how you can resolve the customer’s problems. Listen, test for understanding, and gain agreement with the customer about their business issues. Once the customer has signaled agreement, you then can discuss how you can help resolve the issues.

### Discovery Questions around Business Issues

Some questions to get your customer to share information include:

- What are your biggest challenges?
- What is not working today?
- What are your customers saying about you?
- What are your competitors doing better than you?

Your objective is to uncover your customer’s business issues and their urgency (i.e. are they willing to devote resources to solve them). Use this information to create relevancy for your product or services to address the business issues, and eventually the pain points identified by the customer.

### Tailoring your Message to the Customer’s Role

However, the answers to these questions vary at the same company depending upon the role of the person with whom you are speaking. “What are your biggest challenges?” will get you a different answer depending on the level and functional area of your contact. You may only work with one contact at that company and unfortunately what matters to them is his or her truth, not that of the company as a whole. The CEO/Owner of the company has business issues that are somewhat different from those of the CFO, the Sales and Marketing Director, or the Human Resources Director.

For example, the focus of the CFO typically may be around costs and return on investment. They want to know how the offering will help reduce costs, and in print that usually translates to total cost or worse, price per page. “We need to cut costs by 10%. How can you help us?”

The CEO/Owner will be more focused on concerns for how to grow the business within a strategic time frame. They may be feeling the pain of translating their strategic view in the branding of their company, or dealing with issues of customer retention. “We need to keep our branding consistent so we can attract new customer, and keep the customer base we already have.”

For true consultative selling, deliver a value proposition that presents your company’s unique value to address the specific business needs of your customer.

### **A Value Proposition that Works**

*Marketing Directors are constantly striving to get the most value out of each marketing and advertising dollar and to ensure brand integrity. We have helped (another company) with print-on-demand materials so that the sales force has the tools to best persuade your potential customers. We were able to streamline their ordering process, maintain a content library, and decrease the time it takes for the sales force to get what they need. How would similar benefits help your Marketing efforts?*

## ***How to Shift Sales to a Value-Focused Approach***



Print providers are in an excellent position to help their customers understand the unique benefits of print communications, how to get the greatest return from their investments in printed material, and how to integrate print and digital media to raise the effectiveness of all the channels. Focusing on how customers benefit from their services is the way to get them thinking of a print service provider as a strategic partner rather than a vendor.

This requires shifting sales conversations away from production-related specifications such as print volumes, finishing, and paper stocks. Value-added discussions should be about business goals such as conversion rates, customer retention, upselling, lifetime customer value, and customer experience.

When talking with customers skeptical about print's value in a digitally-oriented world, print sales people should stress some established facts:

- According to consumer surveys, direct mail is the most acceptable form of unsolicited communication. It is often the gateway to establishing a digital connection with customers.
- Marketers who abandoned printed materials are adding items such as targeted catalogs back into the strategy. The printed pieces are remarkably effective at driving consumers to online or retail stores.
- Over 90% of consumers retrieve and review their mail every day.
- Uncluttered physical mailboxes and direct mail pieces that stand out with color, shapes, personalization, or other features gives it a clear advantage over marketing efforts delivered only to overcrowded web browsers and packed email accounts.

It may be necessary to educate customers about how print has changed with the times:

- Digital printing enables short runs of highly personalized and targeted content.
- Codes in the address block allow mailers to trigger precisely-timed complementary digital messages, based on actual postal delivery dates.
- Interactive elements such as QR codes, PURL's, near field communications, and augmented reality connect printed materials to the digital world.

- Geo-location data can control the inclusion of maps or driving directions to physical locations. Smart marketers also use this information to adjust the value of coupons or offers; attracting more distant customers by offering greater savings.
- Print service providers now coordinate direct mail with follow-up email, drip campaigns, landing pages, or automated fulfillment to support full-circle customer relationships.

Finally, printers can overcome perceived objections from customers about the cost of print versus electronic alternatives. Digital printing and data analytics make it more economical to target smaller audiences. This saves on materials and postage and improves campaign ROI by filtering unlikely respondents from the mailing lists. Personalization capabilities of digital presses increase response rates by crafting messages, images, and offers to match the demographics and buying history of each person on the list.

Print service providers can help their customers save on postage by co-mingling mail together to achieve denser presort, using intelligent mail barcodes to qualify for discounts, or timing campaigns to coincide with USPS promotional programs that provide additional postage savings.

Transitioning to value-added selling isn't easy. It requires a different sales technique; the cost per piece to print is not as important as the results. This requires conversations with decision makers and stakeholders, not procurement-oriented customer contacts. Expecting a sales staff to automatically shift to a more consultative-type approach is unrealistic. Some focused, skill-based training is often necessary to enable salespeople to change their approach and master the new skills they need to sell value-added services to marketing and C-suite decision-makers.

Gimbel & Associates has helped hundreds of clients improve their sales effectiveness by adopting consultative and value-based sales approaches to win new customers. If your organization wants to improve your sales effectiveness and position the high value solutions, just contact us. We would be happy to discuss business development services to support your goals.

## Becoming a Strategic Partner for Print Services



Selling print services to enterprises is not about getting a lead for print jobs. You need to be proactive in the overall account strategy, not reactive to fulfilling job quotes.

Your ultimate goal is to become a strategic business partner integrated into your customer's business process, acting as an extension of their operation.

### Your mindset and approach

You need a strategic mindset and approach to establish partnerships with enterprise customers:

- **Making customers**, rather than finding them. This means earning more time with the customer, with an open invitation to continue a dialogue, and with a sincere commitment on the customer's part to take action.
- **Leading** the customer to your solution. It's hard to be competitive when you are simply fulfilling the requirements that the customer has already been established. You want to help them come to the conclusion that your solution is best for their organization.
- **Working strategically** toward a business process change, rather than tactically for a project, or even a program. Don't focus on or limit yourself to procurement/purchasing.
- **Building a network of advocates** with multiple decision makers and influencers. *The value of multiple relationships cannot be understated.* Decision makers and influencers change roles and responsibilities.

- **Getting your customer to think differently** about how they operate and see the benefit of making changes, even ones that can be disruptive.

### Get Past the Commodity Print Sale

Your discussions should not focus on a *single project*. Once you get an entrée in the account, you must re-frame the conversation from *project* to *program*.

A program sales cycle involves different business issues and different players, especially those *outside of Purchasing*. It's about selling to the decision makers in the departments, who then provide their requirements to Procurement.

### Get there first!

Focus on situations *where you are there first*, and haven't been called in by the customer. A customer who calls you in to give a presentation has likely already chosen a frontrunner and is simply looking for comparison points.

### Customer Receptivity to (and Reasons for) Change

Focus on *customers who are receptive to change and have an emerging set of needs*. This is something you may not have done in the past. You must heavily influence how the customer thinks about their business, and how the customer will approach the emerging issues.

While it's critically important to figure out if the customer is *receptive* to change, it's equally important to know their *reasons* for making a change.

Within an organization, different people have *different degrees* of receptivity to change and *differing reasons*.

### Working with Committees

For more complex high-value business partnerships, the stakes are high and decisions are often made by committees.

The #1 reason sales people fail is that they spend 60% of their time with people who can't or won't buy.

Selling to one person is tough enough. When two or more people have to sign off on the deal, selling becomes a lot more complicated – *a series of decisions must take place, not just one*.

The decision team can range in size from a couple of people to a large committee with members in multiple locations.

Either way, you need to quickly identify who has the most buying authority and who is included as an influencer.

### Challenges with Multiple Decision Makers

Think of each decision maker as a separate sale. Keep in mind that different decision makers may be looking at entirely different aspects of the solution.

Building rapport is even more important when dealing with multiple decision makers than it is with a single decision maker. You'll need to earn enough trust so that all the decision makers are comfortable discussing what matters most to them.

Armed with this knowledge, you'll invest your effort in presenting the benefits that resonate with each decision maker.

Consider the following conditions that impact the way you need to handle individuals:

- **Member availability.** Depending on the makeup of the group (executives, department/program heads, etc.), it can be very difficult to assemble all the members at one time. Each one of them has other primary responsibilities that may limit their scheduling flexibility.
- **Lack of group ownership.** Many times, due to politics and the temptation to “hide” in the group, you may find that no one takes ownership. For some people, it's easier to vote with the majority rather than stand up for what they think is truly best.
- **Member motivation and commitment level.** Different motivations and levels of commitment can slow down the decision making process. If a committee member's department or individual responsibilities won't be affected by the decision, their level of interest may wane and they may simply vote with the majority rather than giving the proposal their complete consideration.
- **Conflicting personalities.** Groups and committees are often the place where individual vendettas come out. A member may have ill feelings toward another and his decision may be rooted mostly in spite. Rather than making a decision that's in his company's best interest, he discards sound reasoning and feels victorious in squashing his foe's recommendation.
- **Individual buying motives.** Although the group may have criteria for members to adhere to in making their decisions, when it comes down to it, each person will make his or her own buying decisions based on personal buying motives.

A common mistake is to try to sell to the group rather than the *individual members*. Often there isn't a dominant buying motive for the *group as a whole*.

What's more relevant are the *goals and biases of each stakeholder*, as well as their business and personal objectives.

### Planning for Success

Identify your committee members, decision makers and influencers.

For each person, determine:

- Their goals and biases
- Their business objectives for their function/department
- Their personal objectives for their career or personal interests
- The conditions that may impact sales efforts for individuals

Plan a strategy to sell to each person. Gimbel & Associates can help.

## ***Are You a Partner or an Order-Taker?***

*Originally published in January 2019*



Too many print companies still rely on traditional methods for interacting with their clients. Instead of suggesting creative ways they can help their clients achieve business goals, print companies keep focusing sales conversations on quotes and printed products they can provide. It may seem contrary and uncomfortable, but the best way to sell print may not be initiating a sales call with product pitches. This approach makes print a commodity that any competitor offering a

lower price can easily reproduce.

Print providers must move from product-centric to service-centric organizations. That's not easy to do, but trends in the industry and client demands are making it necessary to make the transition.

Clients understand the benefits of connecting with their customers, prospects, members, donors, or employees on a more personal and relevant level. Exposure to features available in digital communications has raised their expectations for how printed materials should perform.

An emphasis on personalized printed materials forces print companies to change the conversations they are having with clients. To provide a desirable outcome, printers need to have more information about their clients' customers and sales channels. Sales and client service people must extend discussions beyond project specifications for paper, quantity, colors, and finishing to the clients' business goals for a project or program. Printers can't help their clients forge those personal customer connections without understanding the recipients of the printed communications.

Service-centric printers ask questions about what their clients hope to achieve with the printed materials. It's called solution selling. To help their clients craft effective campaigns printers must learn about the individuals to which the print is directed. They need to understand how recipient differences affect details like offers, images, or branding elements. Knowledge about steps in the sales process and activities planned for channels beyond print is helpful in providing strategic ideas to enable print to be more effective.

Training salespeople on consultative selling skills or augmenting the sales staff to add individuals with prior consultative experience, even in a different field, will be necessary for

many print organizations. Consultative selling involves lots of thoughtful questions and good listening skills.

Gimbel & Associates teaches sales representatives to think in terms of ABCR:

**A: Alignment**

What is important to the client and how does that align with what you can deliver?

**B: Be a resource**

Offer ideas and strategies to help your clients and prospects succeed.

**C: Clarity**

Be clear on the value you and your solution will deliver - monetize the value of your solution.

**R: Results**

Focus on measuring what is important to the clients, not the cost of the solutions. Do the clients want more leads, more customers, more upgrades, more demos, or more attendees? Then develop a way to track progress towards these goals.

When your organization is service-centric your salespeople lead customers to your solutions instead of leading with your solutions. We encourage you to begin the process of changing your sales approach to match the demands of the market.

## Getting to Yes

Originally published in June 2017



Printing companies used tried and true sales strategies in the 80's and 90's, but those techniques are yielding fewer results today. Print service providers need new strategies to stand above the competition and attract business that spurs growth. At Gimbel & Associates we've been teaching print industry salespeople how to react to the ever changing business environment in which

they find themselves, with great success.

The process is evolutionary. Companies don't change overnight, but we're sharing helpful tips that can have an immediate impact on sales performance. These ideas will encourage customers to say "yes" more often.

1. Get to yes on agreeing about customer business goals
2. Get to yes on identifying critical stakeholders and decision criteria
3. Get to yes on supplying access to additional data necessary to quantify the value of solutions
4. Get to yes on supporting the process to implement new solutions

### Selling Complex Services and Solutions

Despite all the changes in communications and technology in the B2B world, most companies still buy services based on one of three primary decision criteria: price, relationship, or value. The challenge for salespeople today is how to establish their brand, their company, and their service as a source of added value for their prospective clients.

### Selling on Price

Many customers want to buy on price. History has trained and motivated them to consider everything, even complex services, as checklists of features and price points. To enable objective buyer comparison, this stance reduces print and related services to commodities. B2B buyers, empowered by the internet, can easily gather pricing and competitive information on almost any product or service they need.

If price were the most important decision criteria, successful buyers need only be good researchers. Cost usually *isn't* the most important thing, but purchasing agents and print buyers, who are the subjects of traditional printer sales presentations, rarely consider

grand corporate strategies as weighted factors affecting vendor selection. Their focus is much narrower.

***Getting to yes requires print service provider salespeople and executives to engage with higher ranking decision makers responsible for achieving corporate objectives.***

### Relationship Selling

Many B2B services are sold primarily on relationships and delivering great customer service. Successful salespeople have focused on building solid relationships with clients for years. Unfortunately, changes in areas such as client organization, personnel, procurement policy, mergers, or strategic direction can disrupt even long-standing relationships. New decision makers may bring their own vendor relationships, minimizing the personal connections valued by their predecessors.

That's why you shouldn't depend on a single champion as your sole connection with a customer. In today's complex sales process, with decision by committee common in most medium and large organizations, successful salespeople must get to yes several times with several people to close a deal.

***Getting to yes means widening client relationships to nourish contacts with individuals in many areas of client organizations.***

### Selling the Value

Legacy sales techniques focused on what to print, rarely considering the impact of print projects on customer goals and operations. Sales calls rarely included conversations about corporate objectives, expectations, or campaign results measurement. Clients arrived at sales meetings with their printing specifications already established. All that remained were discussions about paper, ink, finishing, and volume-based pricing.



As we train and coach salespeople, Gimbel & Associates often sees deficiencies in their sales approaches. Salespeople have to do better research, customize their approach and messages with different buyers and influencers, and clearly define the value of their services to their prospective clients. Salespeople need to connect the proposed solution to the impact it will have on customer organizations.

Of course, there will be discussions of price along the way. When salespeople establish value at the beginning of the sales process, however, they can continue to set expectations for making decisions around results and impact. If the sales process starts

with a focus on value, salespeople can position cost conversations within the provinces of financial impact and business goals with more importance than just the cost of the solution.

***Getting to yes requires research to determine how proposed solutions will positively impact customer businesses or resolve their challenges. Ask questions to clarify customer business goals, identify stakeholders, and understand customer decision criteria. Focus on customer-desired results throughout the sales process.***

### Challenger Sales

Contemporary sales strategies now emphasize moving past relationship sales to other strategies like *The Challenger Sale*.

Gimbel & Associates has taught clients how to use these techniques. Their success shows that great salespeople stand out when they challenge clients with new ideas and strategies to impact their organizations. Critical to success with this approach and similar modern sales strategies is demonstrating services and solutions that provide intrinsic value to the client and their organization. While this sounds simple, putting it in practice is not.

### Gimbel & Associates Tips for Getting to Yes



- *Get past gate keepers with a solutions approach that measures the value against the customer's goals.*
- *Get in front of decision makers and establish value for your services and solutions. Be prepared to describe results enjoyed by similar clients.*
- *Gather data on people, processes, and impact to provide context for the value of proposed solutions*
- *Establish value in managing the change process. Show clients how the team will help them implement the solutions.*

Customers are not buying print. If decision makers have said yes, they have agreed the print service provider will allow them to achieve their business goals, resolve their issues, show a return on investment, and impact their end-customers. They are buying results from the printer, not paper and ink.

Great salespeople give their accounts opportunities to say yes several times during the sales process. A decision maker with business goals and challenges is always looking for services and solutions and partners that produce value and results for their organizations.

Focusing on the value of provided services at every stage in the sales process will encourage customers to say yes more often.

## How to Switch to Solution Selling

Originally published in October 2017



As your organization transitions from selling products and print jobs to selling solutions, your sales techniques must evolve. The ultimate value of a print solution is not the printed product. It is the actionable results that come from the print. These results help your clients grow and achieve their specific business goals.

This post is all about making those sales process changes. If you follow these guidelines, your sales performance will improve.

### It Starts Before the First Sales Call

Before you begin calling on prospects, answer these questions:

- Why do customers buy from your organization?  
What can you do that others cannot?  
What case studies or testimonials can you use?  
What skills or business practices differentiate you from competitors?
- What value and business results does your company help clients achieve?  
This goes beyond saving them money. You must be able to articulate how your services impact your clients businesses.
- Which potential clients on your list appear to have clear business goals and a desire to change?  
Companies satisfied with past performance are likely to continue the practices that generated those results. Their only objective is doing the same at lower cost. Expanding or evolving organizations are better matches for print-based business solutions.
- Why did your team win past deals, and what caused you to lose some?  
Effective sales teams have perfected processes that track and measure their effectiveness.
- Which accounts are worthy of the extra time and effort required to sell them a solution?

Time is a commodity. Solution selling can be a long process involving several people on both sides of the transaction. Be sure clients will give you access to the people and information necessary to craft an effective solution for them.

## ABC No Longer Applies

In the past, experts trained salespeople to “Always Be Closing”. The aim was to continue pitching until a prospect signaled their interest and then swoop in and get them to commit. Solution selling doesn’t work that way. Companies are looking for partners who understand their business and can provide valuable solutions to help them achieve their desired goals. They don’t want to be sold your solutions.

Gimbel & Associates teaches sales representatives more meaningful mnemonic – **ABCR**:

### A: Alignment

What is important to the customer and how does that align with what you can deliver?

### B: Be a resource

Offer ideas and strategies to help your customers and prospects succeed.

### C: Clarity

Be clear on the value you and your solution will deliver - monetize the value of your solution.

### R: Results

Focus on measuring what is important to the clients, not the cost of the solutions.

Do the clients want more leads, more customers, more upgrades, more demos, or more attendees? Once you know their goals, develop a way to track progress towards reaching them.

Lead prospects to your solution instead of leading with your solution.

## Decision Making

Most solution-related decisions involve at least the following:

- **Application Owners** have a personal view of the potential solution. They want to understand how your solution will help them do their job or make it easier for them.
- **Influencers** are concerned with how your solution will help their company. They want clarity about how to align your solution with the organization’s goals.
- **Decision Makers** have a financial view of solution results. They want to know how your solution will impact the bottom line.
- **Risk Managers** are often a fourth type of decision maker influencing the outcome. They are looking for a clear business case justifying the investment. Risk Managers will weigh the risk of changing against the cost of doing nothing.



As a solution seller you must understand the role of the decision makers involved and how each client will evaluate your solutions and proposals in terms of time, cost, and quality. One effective method for sellers is to make “Yes Now” your goal. Secure agreement to move forward in phases. Get a “yes” to a pilot, trial, or initial offer with a plan to refine the program based on

tracked results. By focusing on results, “Yes Now” makes it easier for clients to say yes to *something* when they can’t commit to everything at once.

### Top Down or Bottom Up?

When working through a client organization, both approaches can produce results. With a structured process to gain clarity on goals and objectives, you may find it easier to gather data going from the bottom up. When developing arguments about the monetary impact of a solution, working from the top of an organizational structure is more effective.

Regardless of your approach to the org chart, you must be careful to clarify the next steps in the decision process, identifying the key decision makers involved. These individuals may change over time.

Clear and concise communication throughout the sales process is essential. Record all action items from meetings. Plan short, clear presentations or follow-up communications that are understandable by someone who did not attend the meeting. Your documents, emails, and presentations must sell for you when you are not in the room. They must connect with decision makers you may not get to meet until later. Raise the bar in your communications.

### Samples and Demos

Samples, demonstrations, mock-ups, and proof-of-concept materials are all important. Presenting these items are key milestones in a good sales process. You can make a big difference in your sales success rate by selecting the right time to use them.

Do not present samples at the first meeting. You don’t have enough information yet about the client’s objectives, their decision-making processes, or the people involved. Chances are good you’ll miss the mark and lose credibility by showing materials and mock-ups too soon.

Only present visual examples after you are clear about the desired results and how your solution aligns with your client’s goals. Identify the decision makers and critical influencers. Then demonstrate for them how your solution meets their defined needs.

### **Successful Solution Selling**

Remember that customers are not buying print. If you've made a solution sale, they have agreed the print service provider will allow them to achieve their business goals, resolve their issues, show a return on investment, and impact their end-customers. They are buying results from the printer, not paper and ink. Use the tips above to change your approach and win more often.

## Customer Journeys for Business Expansion

Originally published in July 2019



Customer journeys from awareness to purchase take place in a variety of communication channels. Multiple touch points provide opportunities to educate customers, transact business, or entice them to take the next step in the buying process. Some of those touch points involve print and others occur in digital environments.

Familiarize yourself with how your clients guide their customers' journey. This will strengthen your client relationships and reveal new revenue opportunities.

Print service providers are not exposed to all the interactions clients have with their customers and prospects. You may be involved with only one small part of the relationship, such as direct marketing postcards or product brochures. To help your clients achieve their business objectives, you need to know more. Ask your clients to walk you through their buyer journeys to find out how the services you provide correspond with the client's overall communication strategies.

### Try This with Your Clients

Many companies don't have a firm grasp on their own buyer journeys. You may need to help them. Charting all the existing inbound and outbound customer communications can be an enlightening experience for your clients. Spend a day in a conference room with them. Ask questions and hang samples of their printed and digital messaging on the walls. This exercise will uncover gaps and present opportunities to improve.

The goals for assembling all the customer communications in one room are to identify the customer touch points, understand the customer actions each communication promotes, and assess the messages effectiveness in doing so. List the events, timing, or triggers that cause each communication to occur. Observe how communications link to one another. The breadth and complexity of customer relationships expressed through customer touch points is a persuasive argument for further analysis when seen in its entirety.

A common journey mapping discovery is noticing that customer communications are occurring in isolation. Multiple departments may communicate with the same customers at the same time and the messaging is inconsistent. This happens often with transactional documents, but also in marketing. Companies execute separate campaigns for email, social media, web, and print with little or no attempt to connect messages delivered in multiple channels.

The communications charting exercise helps you and your clients see the connections (or disconnections) between printed documents, electronic communications, and in-person conversations. You may discover duplicate efforts, contradictory messaging, or gaps in the process. Journey maps reveal opportunities for your company to take on tasks such as triggered fulfillment, tracking, personalization, or integrated print and digital campaigns.

### Show Clients What You Can Do

Printers are the communications experts. If your clients' marketing efforts aren't generating acceptable responses, you can suggest changes. Printers can advise clients about improved targeting through better list selection, duplicate removal, personalization, campaign timing adjustments, updated graphics, or multi-channel approaches.

Don't expect your customers to know what modern presses, software, and other technologies used in your operation can do for them. Compile print samples, demonstrate your multi-channel and tracking capabilities, and share customer case studies with your clients. Help them understand how working together on their customer touch points will help them achieve their business goals.

### Examine Your Own Customer Journeys

- Have you charted your own clients' journeys?
- Do you know what steps customers take as they notice your company, compare competitors, agree to a sales call, and decide on a vendor?
- Are you taking the actions necessary at each stage to encourage prospects to proceed through the process?

**Self-assessment is tough.** Objectivity is difficult to achieve and few business owners can find the time to examine their own business processes in depth. If that sounds familiar, call us. The professionals at Gimbel & Associates have extensive experience in the print business. We can help you create the strategies you need to grow your business, enter new markets, and embrace a new way of selling your services.

## Know Your Customer and Their Needs

Originally published in May 2019



We can often get so focused on producing the job itself, that we lose sight of WHY a customer is getting the job produced. It's not because they don't have enough work to do or that they have extra money to spend. It's because the **job supports a business need**.

As you have your consulting conversations with the customer, talk about more than just the job. After all, the "job" is never going to shop with you again... but the customer and the company will.

What do your customers need for their business? What are they thinking about BEFORE they have a job for you to produce – that is, what is their business need?

- Find new Customers
- Retain their current customers
- Market and sell their products and services
- Promote a business, a special offering or an event
- Improve their company's image
- Train people efficiently
- Document their business processes and transactions

Business needs go far beyond a customer's requirements of their print applications. Business needs include everything a customer needs to do or achieve for their company to be successful. Ultimately, business needs are what drive the customer's investment in print applications.

### Who is your customer?

From small businesses... to larger corporate customers that have contracts with you... to people buying for their own use. All these customers may have different reasons for choosing your business. Across this range of customers, business needs can be pretty similar, only the scale is different.



As an example, let's review the business issues that are specific to one key retail customer type: **Restaurants**. Here are things that are required for a successful restaurant business.

1. **Quality** of the food, service, and ambience
2. **Keeping** the most high-value, regular customers
3. **Hiring and training employees** – turnover can be high in restaurants, so there are constantly new employees to train
4. **Meeting regulatory requirements** regarding licensing, insurance, franchising, labor law, workers' compensation, etc.
5. **Operational efficiency.** Operations include all the activities that take place every day in the kitchen, dining room and bar to prepare food and drinks and serve them to customers.
6. **Financial functions** -- accounting, cash management, cost control as well as operational and financial reporting.
7. **Marketing** – that is, getting the word out about the restaurant and positioning it correctly in the minds of the public. Marketing includes public relations, community involvement, advertising, promotions and projecting the desired image. Media may include print, broadcast, online and social media, such as Facebook, Instagram and

The better you understand your customer's business needs, the better your recommendations for print applications will be.

### How Print Applications Support Business Needs

Here is a list of print applications for a restaurant. Think about how each of these support a business need for the restaurant.

- **Menus:** The look of a menu can increase the customer's appetite and interest in trying things. Add a logo, or a photo of the food. Consider using lamination or never-tear paper. Maybe create a tri-fold menu to take home.
- **Rack Cards:** These can be made available for future special events, such as "Restaurant Week" or Mother's Day specials.
- **Catering Menus:** Keeping current versions on hand for customer inquiries can help win new business. Consider using 2-part carbonless for giving the customer a signed copy quickly.
- **Refrigerator Magnets:** Magnets can be included with large catering orders; this provides persistence of messaging from the fridge for future carry-out or catering orders.
- **Cookbooks:** Selling cookbooks for special recipes can provide a new revenue opportunity.

- **Postcards:** Can be mailed to the local households to bring awareness to new potential customers.
- **Business Cards:** High-quality business cards can create a business image that reflects the high quality of their offering and/or reputation.
- **Gift Certificates:** Providing gift certificates enables new customers to be “referred” to the restaurant by others.
- **Breakroom Posters:** Great way to inform employees of rules, regulations, new policies, changes in procedures, benefits and more. Also a great tool for employee recognition.
- **Bag Stuffers:** Can include coupons or coupon stamp-cards on heavier stock that will entice customers to return for future visits.
- **Newsletters:** Can inform regular customers of upcoming special menus, special events, or reminders to book holiday parties, graduation parties, Mother’s Day, Father’s Day, Valentine’s Day events.
- **Order Forms:** Well-designed order forms can help ensure order accuracy, which means better service and greater customer satisfaction.
- **Flyers:** Can be handed out at special events such as charity fundraisers or festivals and can help drive awareness for new customers.
- **Signs & Banners:** Draw attention to their business or to special events
- **Survey Cards:** Provide valuable input from customers that allows the restaurant to make continuous improvement
- **New Hire Training Manuals:** Well-designed training manuals can help newly hired employees get up to speed more quickly, contributing to better efficiency and perhaps reduced turnover. Suggest printing them on-demand (rather than in large quantities) so the content can be updated as often as needed. Using color can help employees remember what they’ve learned. Coil binding is sturdier. Use tabs to make information easier to locate.

Customers in a given vertical market are often interested in the same types of applications. Understanding your customers’ applications allows you to identify problems and recommend solutions to address them. Then you will know what is important to your customers and their business, and how their print applications impact their business.

Almost any print application your customer needs serves one of three purposes: to **inform**, **persuade** or **record**.

- **To *inform*:** Training manuals, curriculum materials, flyers, posters, business card, name tag, menus

- To **persuade** – to get someone to take action: Any type of marketing materials, menus, coupons, product brochures
- To **document** a process or keep a record – Order forms, tax forms, personnel forms, job application forms

Why is it important to know the purpose of the document? Because it helps you understand:

- How important image quality or use of color will be.
- How much the customer is willing to spend.

### Who is the Audience?

Understanding the audience for the printed piece is just as critical. Is this document going to be a customer-facing document for your customer? That is, will their customers base business decisions on the quality of the document?

Is this document internal use? Maybe the highest possible image quality isn't as important, but the judicious use of color will make information more understandable.

Is this document for the use of others outside the company (but not their customers)? An example would be tax forms, regulatory or compliance forms, etc.

Customer-facing documents – those that your customer uses to generate revenue from their customers – are usually the ones where customers care more about image quality, color, and professional binding options.

You can provide enormous business benefit to customers. Think of times when your customer said “Thank you for your help”. Remember that “On Time”, “Great Quality” and “Produced in a Better Way” are some of the main ways you can increase business for your company.

## Understanding Vertical Markets

### Vertical Markets

A vertical market is a group of similar businesses that has a common set of needs for products and services. Customers in the same vertical market have the same types of applications, and they often have the same business issues.

Getting to know a vertical market helps you sell because you:

- Understand your customers' business
- Know what products and services they use
- Can speak their language
- Can emphasize the benefits that are important to their business

The more you understand about the concerns and issues of these vertical markets, the more credibility you will have with your customers because you'll be "speaking their language". You'll be in a better position to recommend offerings that address their business needs.

Start by focusing on the top two or three vertical markets that your company serves.

### The Healthcare Example

Let's use Healthcare as an example. Healthcare industry sectors have a need for every kind of print related product.

The sales, marketing and communication needs drive many high value applications. The core focus of these organizations is varied including: lead generation, customer retention, education, employee training, publications, regulatory disclosure, and compliance.



### Key business issues in Healthcare:

- The "business" of healthcare is being scrutinized for ways to optimize existing processes
- Solo and small group practices provide growth opportunities for physician practice management systems
- Regional health networks are emerging
- Increasing cost of health care; overall spending on the rise
- Labor shortages in nursing, pharmacy, and other critical care specialties

- Increasing consumer/patient expectations
- Regulatory compliance
- Need for security and privacy
- Litigation and oversight concerns
- Increased requirements for documents
- Increasingly focused on cost reduction
- Explosive growth in patient data to manage

**Key applications in Healthcare:**

- Direct mail: post cards, reminder notices, fundraising, events, promotions etc.
- Hospital brochures, capabilities brochures
- Booklets: training manuals and job aids
- Posters: Education, compliance
- ID Cards
- Directories – updates and summaries connected to web content
- Newsletters
- Enrollment kits
- Forms/letters: Compliance, education, admissions, discharge instructions
- Labels: Records management, education, compliance
- Menus
- Dietary Card
- Patient Care Form
- Patient Invoice
- Illness Education Brochure
- Reminder cards/magnets
- Posters/signage

When you understand your customers' business issues and print applications, you will be able to position your offering as a solution to their problems. And as you help solve their problems, you'll build credibility.

**What are the benefits to focusing on Vertical Markets?**

- You will eventually become experienced in those areas; you can then leverage your knowledge when speaking with other customers in those markets.
- You will be able to more quickly develop success stories.
- You will have a sharper and more relevant talk track that will gain the customer's interest and help you win business and become a strategic partner.



## Postal / Print & Mail

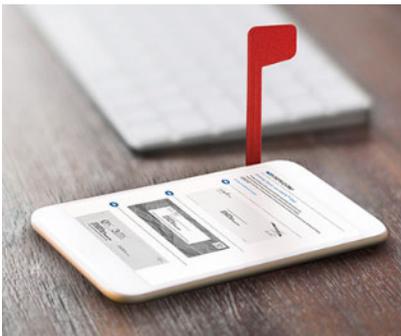


- Do you offer postal services or “print and mail”? And doing it profitably?
- How well do you keep up with postal regulatory changes?
- Are you planning to add “print and mail” to your offerings?
- How can you leverage opportunities for direct mail in a changed marketplace where in-person touchpoints may be fewer?

Online communications can be clicked-through and deleted, going largely unnoticed. Physical mailpieces provide a physical presence and require a physical touch. This is just what the customers of all print services providers need to stay engaged after long periods of virtual-only presence.

## **An Easy Way to Connect Print and Digital**

*Originally published in November 2018*



The US Postal Service's Informed Delivery program continues to gain momentum. As of this writing, the program includes around 13 million subscribers.

An impressive 65% of email subscribers check their Informed Delivery emails nearly every day. If you've ever run email campaigns, you're probably aware that achieving a 65% open rate is quite a feat.

Informed Delivery is free for both mailers and recipients. Learn more about it [here](#).

### **Consumers sign up for Informed Delivery at USPS.com.**

After verifying the customer's identity, the USPS sends the customer scanned images of the letter-size mail they will receive in their physical mailboxes later in the day. Emails containing the images generally arrive in consumer inboxes in the morning.

Optionally, mailers may specify that the standard greyscale mailpiece images be replaced with full-color graphics that include calls to action. Mailers can segment these representative images and links, allowing them to test multiple versions or deliver relevant offers according to variables such as sex, age, or geographic location.

Informed Delivery benefits direct marketers by adding a second ad impression and a call to action to a physical mailpiece with no added postage or postal fees (to recipients who have signed up for it). It's an instant multi-channel campaign produced with a small amount of work.

The program currently covers only letter-size mail. Images of catalogs, periodicals, flats, or parcels are not part of the product. However, mailers of these pieces can still run Informed Delivery campaigns with representative images and links, gaining all the benefits of the program without a need for the mailpiece scans.

### **A Win for Print Service Providers**

This program offers several opportunities for print service providers. They can set up campaigns for their clients to include the full-color representative images and landing pages. This extra work generates new revenue from existing clients. More importantly, Informed Delivery helps print providers take a step towards integrating their services more closely with their clients' objectives for sales or lead development.

Depending on the offer, other printer opportunities triggered by Informed Delivery could include fulfilling requests for documents or sample products, micro sites, follow-up communications, or highly targeted mail campaigns.

Print service providers can charge clients to add personalized or segmented messages and images to the address-side of mailpieces. Informed Delivery subscribers will see these messages at least twice—once when they view their daily Informed Delivery email and once again when they retrieve the physical mail from their mailboxes. In many households, the family member receiving the Informed Delivery email differs from the person gathering the day's physical mail, expanding the audience even more.

### **Save on Postage**

Recently, the USPS announced plans for a new postal promotion for mail featuring Informed Delivery campaigns. Assuming the USPS proposal is approved, it will be possible to MAKE money on Informed Delivery during the promotional period slated for September through November 2019. It costs nothing to take part in the program which rewards mailers with a 2 percent postage discount on qualified mailings during the promotion. Service providers may pass the postage savings along to clients, split it with them, or keep it.

### **Participation is Growing**

The USPS is aiming for 40 million Informed Delivery subscribers by 2020. If you want to find out how many contacts on your list are already subscribed, the USPS offers a free pre-campaign analysis to assess the potential reach of your planned campaign.

After your campaign, you'll receive statistical reports listing the opens and clicks associated with the digital messages. Schedule meetings with your clients to sit down and go over these reports. They offer an excellent opportunity to discuss next steps or new campaigns!

For a print service provider struggling to enter the multi-channel marketing arena, Informed Delivery can be an easy transition that requires no capital outlay. The US Postal Service is offering plenty of help to get you started and your customers will benefit from the added exposure to their messages. Check out the program and make plans to talk to your clients about doubling their impressions and augmenting the effectiveness of their direct mail campaigns for a low incremental cost.

## **Making More Money with Mail**

*Originally published in September 2017*

In April, 2017 the US Postal Service rolled out a new way for marketers to communicate with their audience. More than five million households subscribe to the free *Informed Delivery* service and the numbers are growing. With Informed Delivery, consumers receive daily emails containing scanned images of letter-size mail they will receive in their physical mailboxes later in the day.

Campaign effectiveness improves when marketers connect physical and digital channels. Informed Delivery is the easiest way yet to accomplish this feat. The program doubles consumer views of marketing material with no increase in cost or extra preparation. We're advising print service providers to update their clients about this opportunity to increase direct mail effectiveness.

Best of all, Informed Delivery messages from a trusted entity like the post office are registering open rates of 70%, substantially outpacing average email performance. 88% of enrolled postal customers check their Informed Delivery emails nearly every day. This news should encourage print service providers working with clients skeptical about the value of direct mail. This postal product has even impressed those hard-to-reach millennials. 49% of adults aged 18-34 said they were interested in Informed Delivery.

### **If it's free, how do I make money with Informed Delivery?**

The new program offers several opportunities for print mail service providers. Most obvious is consulting with clients to re-design their outbound envelopes, postcards, and self-mailers. Service providers can add eye-catching text and graphics to the front of the material, making them stand out in both Informed Delivery emails and physical mailboxes.

For the greatest impact, use digital technologies to segment and personalize the envelope teasers. Besides extra revenue for personalization, client conversations about variable data on the outside envelopes will inevitably lead to discussions about personalizing the inside material as well. Service providers generate extra revenue for themselves, but most importantly focus client discussions on value-added services.

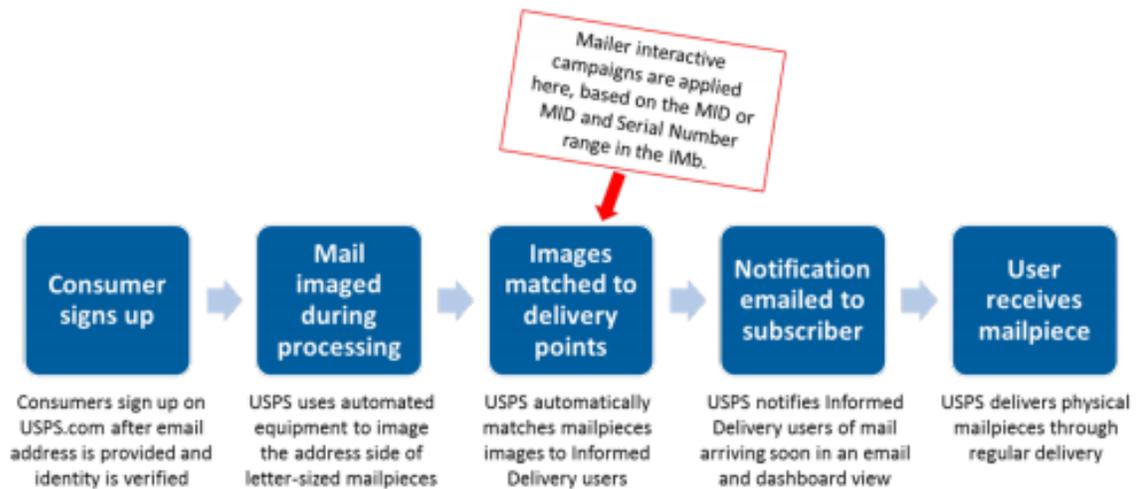
### **Informed Delivery Campaigns**

Because the US Postal Service offers enhanced program features that make direct mail even more effective, smart service providers are recognizing new revenue opportunities with Informed Delivery. The USPS does not charge mailers for these features, making them attractive ways to add value.

Besides providing scanned greyscale images, the USPS allows mailers to provide full color supplemental content that encourages mail recipients to take immediate action directly

from their morning Informed Delivery emails. The USPS refers to these capabilities as Informed Delivery Campaigns.

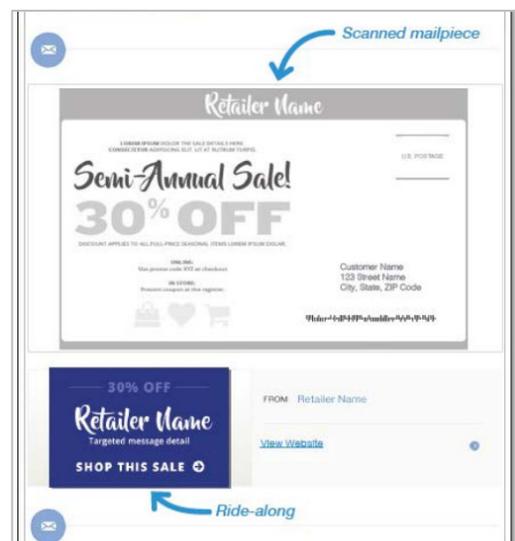
Service providers can charge clients for setting up Informed Delivery campaigns, sell website landing pages, collect and report on statistics, or handle fulfillment. This presents the opportunity for additional design services to generate the color images used in Informed Delivery Campaigns.

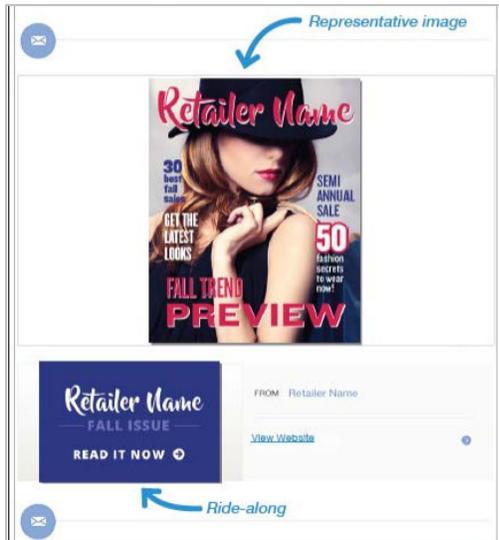


Mailers can augment the USPS greyscale images with **Ride-along** graphics and **Representative** graphics.

Ride-along graphics are clickable images that appear along with the greyscale USPS mailpiece scans. Mailers can also supply clickable text links.

Representative graphics are full-color static representations of the mailpieces. They *replace* the USPS greyscale scans in the mail recipient's daily emails. Mailers supplying Representative graphics will also provide Ride-along graphics and text links to encourage customer action.





The postal service is scanning only letter size mail for Informed Delivery. Marketers can, however, use Informed Delivery campaigns to supply Representative graphics that will appear in customer emails. A matching greyscale image is not required, so the Representative graphics can promote un-scanned flats or periodicals.

### How do they do it?

The USPS matches digital campaign elements to scanned mailpieces using intelligent mail barcodes. Marketers can even segment the campaign by specifying mailpiece serial number

ranges. This functionality also allows service providers producing mail bearing their own Mailer ID (MID) to submit campaigns for multiple clients.

Requirements for submitting an Informed Delivery campaign are straightforward. The USPS has published complete instructions online:

<https://www.usps.com/business/pdf/informed-delivery-interactive-campaign-guide.pdf>.

Mailers submit campaign information to the USPS via emailed Excel files or Postal One. Mailers should work through the Informed Delivery Project Office to set up their initial campaigns. Service providers can reach the project office at: [USPSInformedDeliveryCampaigns@usps.gov](mailto:USPSInformedDeliveryCampaigns@usps.gov).

Prior to mailing, marketers can determine how many customers from their list have subscribed to Informed Delivery. The Pre-Campaign Saturation Report is composed according to 11-digit delivery point barcodes, so mailers must run their lists through postal software before requesting the report from the USPS.

After the campaign concludes, service providers can access metrics to share with clients, such as open rates and clickthroughs. Future reports will provide other valuable campaign effectiveness data.

The US Postal Service has published a list of planned enhancements that will make communicating with customers and prospects through Informed Delivery even more interesting. Analysts expect the US Postal Service will eventually charge mailers for the most valuable components. Why not start running campaigns now to get familiar with the process?

Informed delivery campaigns provide opportunities to be a leader with new integrated mailing services that will help your clients add value to their mailed communications.

## **What's Next for the USPS**

*Originally published in February 2018*



The mailing business is increasingly driven by technology and data, so it's important for mailers to stay informed and up to date. Neglecting to keep up on postal

developments can result in missed opportunities and unnecessary costs. U.S. law mandates the US Postal Service keep rate increases in line with the Consumer Price Index (CPI) for market-dominant products like First Class letters and Marketing Mail. The law allows more pricing flexibility for parcel shipping services, where the USPS competes with private carriers.

The CPI price cap keeps rate increases within a definable range, but when the USPS changes rates, it doesn't mean there are proportional increases across the board. Rate changes for individual classes and presort levels will vary, and for some, the rates may actually go down.

See this more recent notice from the USPS regarding the Jan 2020 rate changes:

<https://about.usps.com/newsroom/national-releases/2019/1009-usps-announces-new-prices-for-2020.htm>

### **New Rates**

In 2018 the increases for Commercial First Class Letters were between 0.2% and 1.3%. Some presort rates for postcards are unchanged while others increased up to 1.6%. The biggest changes for First Class are in Flats, where the USPS has lowered many prices, but postage for 5-digit presort flats increased by 6.3%. The USPS raised the weight limit on letters to 3.5 ounces in 2017. Flats mailers would be smart to convert their lighter-weight flats into letters, realizing a significant postage saving.

2018 postage for Marketing Mail was relatively unchanged for letters, but Marketing Mail Flats at all levels increased by up to 8.7%. Non-Profit Letter postage rose between .6% and 3.2% while some Non-Profit Flat rates increased and others decreased.

Parcel shipping costs also changed. Priority Mail Commercial rates increased, with some rates rising by as much as 10%. Flat Rate products suffered the greatest increases. Retail prices also increased, but not as dramatically. Commercial postage rates for Priority Mail are still lower than their Retail counterparts.

## Procedural Updates

### **Intelligent Mail® Barcode for Mailpieces**

Besides postage rate changes, 2018 brought about a new way for the US Postal Service to monitor mailer compliance with move update rules.

Under the old system, based on the Mail Evaluation Readability Lookup Instrument (MERLIN) machines, the Postal Service checked only a sample of each mailing. If MERLIN found too many uncorrected addresses, the Postal Service would levy a fine based on the entire mailing. The compliance threshold was 30%. Now, the USPS is using technology built into the Intelligent Mail barcodes, enabling them to check every piece sent by a mailer. With this method, known as the census method, the compliance threshold is much lower — 0.5% per calendar month. The fine has increased to eight cents per non-compliant piece.

Mailers who neglect to keep their address lists current but have gotten by because of MERLIN's small sample sizes and high tolerance threshold, may learn they are suddenly paying postal fines. Mailer Scorecards tell each mailer how their jobs are performing against the standard. By frequently monitoring statistics reported on their Mailer Scorecards, mailers can mitigate the impact of move update compliance violations and make adjustments before the end of the month.

The way commercial mailers pay for postage and services has also been changing. The Postal Service is replacing the familiar Centralized Account Processing System (CAPS) with the new Enterprise Payment System (EPS). Mailers will be allowed to maintain both CAPS and EPS accounts during a transition period until the USPS retires the CAPS system. Besides connecting the payment platform to the *Postal One!* mail submission software, mailers will benefit from the new EPS system by making deposits into their accounts at any USPS retail location or through electronic check capture.

The US Postal Service has replaced IMb Tracing, the facility for tracking mail as it moves through the USPS delivery network, with Informed Visibility (IV). Transition to the new system has been anything but smooth, with several delays and missed deadlines. However, the USPS has remained dedicated to rolling out Informed Visibility and is now providing mailers with more data in near real time. Mailers complained about delayed data delivery with IMb Tracing. Tracking data sometimes arrived only after the mail was delivered. Informed Visibility will correct this deficiency, allowing mailers to make better decisions about lead times, in-home dates and coordinating email delivery with physical mail.

## Mail Continues to Evolve



Far from being a passive or archaic medium, mail continues to change with the times. As with every other business, data is the key.

Intelligent Mail barcodes, seamless acceptance, and other innovations by the US Postal Service are keeping mail current and relevant for American consumers and businesses that rely on the mail every day.

## Postal Regulations That Trouble Print Companies

Originally published in August 2019



Print service providers don't always mail what they produce for their clients, but when they do, they need to know the US Postal Service rules and regulations. Generating mailings (or even *designing* mailings) without considering these rules can blow the client's budget, cause delivery delays, or depress campaign results. In severe cases the postal service might even reject the mail.

Help clients get the most from their investments in printed and mailed communications and generate worry-free mail by being informed about mailing requirements.

### Move Update

Move Update is the USPS' regulation aimed at decreasing the volume of mail that requires forwarding, disposal, or returning to the sender. Mail that is Undeliverable As Addressed (UAA) increases expenses for the postal service and delays deliveries. It also diminishes the ROI for your customers' mailing campaigns.



Mailers have choices about how they go about conforming to the move update regulation. The Postal Service approves of three methods:

1. **Address Correction Service.** This address correction method is accomplished post-mailing. The USPS electronically notifies mailers with reasons for non-delivery and address corrections. Mailers must correct their data so they don't mail to the same bad address again. Failure to correct addresses can prompt the postal service to revoke postage discounts allowed on previously sent mail.
2. **NCOA Link™.** Pre-mailing address correction is accomplished via NCOA Link™. Mailers compare proposed mailing lists to the USPS national change of address (NCOA) file and must correct the addresses of anyone who has moved. Mailers must complete this processing within 95 days of the mailing to satisfy the move update requirements.
3. **Ancillary Service Endorsements.** Endorsements printed on the mailpieces or encoded in the intelligent mail barcode tell the postal service what to do with UAA mail. Mailers can choose to have the pieces returned to them, have pieces forwarded if possible, or receive separate notices. Use caution when implementing

Ancillary Service Endorsements, especially for Marketing Mail. Fees and return postage costs can be substantial if the mailing has numerous undeliverable pieces.

### In-Home Dates

Timing is important. Clients want assurance of when their marketing mail will be delivered, but predictability isn't always easy. In-home dates are obviously important when promoting a sale or an event, but multi-channel campaigns also rely heavily on when direct mail arrives in consumer mailboxes.

Unlike with First Class, the USPS doesn't promise delivery of Marketing Mail within a certain number of days. Local deliveries generally occur in 2-5 days, while national delivery can take up to 21 days. The wide delivery window is a challenge for mailers requiring a precise in-home date. Fortunately, mailers have options that will help them predict in-home dates more accurately:

1. **Informed Visibility (IV).** Intelligent mail barcodes printed on mailpieces and on pallets and other mail containers allow the USPS to track the progress of mail as it moves through the delivery network. IV has shown steady improvement since mail tracking was first introduced and now features near real-time status updates. Mailers can use the IV data supplied by the US Postal Service to trigger the release of other communications such as emails or text (SMS) messages. They can also use IV data from previous mailings to predict delivery dates for their mail in various regions across the country.
2. **Drop Shipping.** Instead of entering all the mail for a national campaign at their local postal facility, mailers can truck the mail (at their expense) to Sectional Center Facilities (SCF's) nearest the delivery addresses. The USPS discounts the postage on such mailings, which can offset the trucking cost. Many mailers enlist the services of logistics firms specializing in transporting mail to postal facilities to coordinate drop shipments. By dropping the mail at locations near the actual USPS delivery units, mailers can more accurately control the in-home dates of their marketing mail.

### Mailpiece Design

The USPS establishes specifications for postcards, letters, folded self-mailers, flats, and parcels to allow the pieces to run efficiently on postal equipment. Clients don't always understand the requirements. They might design materials that incur surcharges, re-classify the mail, or get rejected by the post office.

Clients have been known to place text or graphics in areas reserved for the address block and barcode. Other design issues can include unacceptable aspect ratios, material that is too stiff, improper self-mailer construction, and uneven envelope contents.

### **Get Mailing Advice Early**

Ideally, clients should consult with their print/mail service provider before they settle on a mailpiece design. Many US Postal Service rules apply only in certain situations and the regulations change from time to time. Clients shouldn't be expected to be familiar with them all.

If printers have questions about particular mailpieces, they can always ask for guidance from Mailpiece Design Analysts (MDA's) from the post office. It is much easier to make design changes before the material is produced. Modifying the existing mailpieces or re-printing the job after discovering the pieces don't meet USPS guidelines will be expensive and result in dissatisfied clients.

## Talent Acquisition & Development

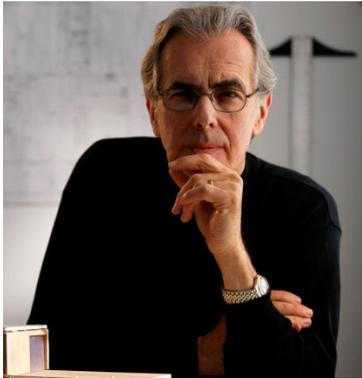


- Do you focus as much on the people in your organization as you do on hardware and software?
- How much effort do you invest in sourcing, developing and keeping the best people?
- How would your employees describe your company culture?

A successful print operation depends on the right blend of people, process and technology. Many organizations focus on the last two, with less consideration on the lifeblood – people.

## Future Employees

Originally published in December 2018



Competition is fierce in the printing business. Nearly every print operation can buy the same equipment and software you use to run your business. Many printing companies offer much the same products and services as local, national, and international competitors.

The real differentiator for most printing companies is their people, and a huge problem is looming regarding your staff. Where will your future employees come from?

Printing Industries of America (PIA) says a majority of printing companies estimate 30%-50% of their skilled workforce will retire in less than ten years. Two-thirds of companies responding to the PIA survey said the median age in their offset pressrooms was 45. Your most experienced people are getting ready to walk out the door, and that will be an issue.

To make matters worse, traditional sources are no longer producing workers with the skills necessary to step into critical staff positions. Printers can't count on trade schools and labor unions as reliable pipelines for new employees. Since outside help isn't the answer to worker scarcity, the best strategy is to tackle the problem yourself.

### What Printers Can Do

Large print operations have realized their exposure to employee drought. Many have implemented in-house training programs or have plans to do so. But what about smaller companies? They rarely have the resources or the budgets to undertake comprehensive self-contained skills development programs. Printers typically regarded training as an expense, not a long-term investment, making it difficult for smaller firms to set money aside to develop a workforce of the future.



A training program is only one part of the solution. Printers must also recruit new people to take part in the training. That can be a challenge. Young people looking for careers aren't thinking about the printing industry. Compared to high-tech fields, printing seems old and outdated, even as the business is rapidly changing and includes a great deal of advanced technology. The printing industry has done a poor job of promoting itself to potential new employees, making it harder to recruit young people to fill the roles vacated by retiring veterans.

On a national average, only about 60% of high school graduates plan to attend four-year universities. This is an opportunity to promote careers in the printing business by promising skills development, advancement, steady employment, and manageable tuition costs to non-university bound students. Printers may find value in partnering with local high schools, junior colleges, trade schools, churches, and community services to create courses for students to learn about the printing business and then enter apprentice programs.

Job fairs may be an inexpensive recruiting resource for small printing companies. Just be sure your presence at the event communicates the modern, challenging environment the printing industry represents. Highlight your contemporary technology at the job fair to encourage resume-carrying candidates to sit down and hear about what your company offers. Be prepared to extend competitive wages which may be higher than you've offered in the past. Companies are now competing for workers - especially those related to the trades. You're not competing with only printing companies for workers; you are vying for the same people as all employers in your area. Workers are looking for reasonable wages and advancement opportunities.

Reach out to school guidance counselors to make sure they understand that printing isn't a dying industry, but one with plenty of technology and opportunities for growth. Arrange for tours of your facility or provide school officials with informational content they can hand out to interested students.

Job fairs and facility tours are events and must be planned and managed to be successful.

### **Get Some Help**

Governments may partially sponsor programs like summer interns that will expose young people to the printing industry and grow a pool of potential future workers. The U.S. Department of Labor announced grants for apprenticeship programs in fields including advanced manufacturing, which should cover printing. Hardware and software manufacturers may also be persuaded to take part in attracting workers to the print industry, along with trade associations.

Printers should concentrate on training workers in a wide variety of areas. The industry is in transition. Developing employees with knowledge of all parts of the business allows companies to allocate resources according to developing trends and demands. This will also help with recruiting. Printers should instruct trainees in areas such as offset press production, pre-press, digital printing, multi-channel distribution, color management, variable data handling, finishing, sales, technical support, and automated workflows.

The graying of the print room is probably more impactful than rising postage rates, paper prices, or losing print volume to digital channels. Make plans now for how your shop will operate five to ten years from now and make investments in your future by ensuring your business has the skilled workers you'll need to sustain your enterprise.

## Automation Won't Solve the Print Industry's Staffing Challenges

Originally published in November 2019



The printing business is awash in advanced technology and automation. One can walk around the trade shows to observe software and equipment everywhere that handles many of the tasks formerly dependent on experienced printing professionals. Automation enables printing companies to produce more work in less time and at lower costs. But that doesn't eliminate the need for skilled humans to envision solutions, monitor progress, and include new technology in efficient workflows. And legacy equipment still in use at most print facilities will

require educated operators.

For quite some time the print industry will need talented individuals dedicated to keeping print a viable and valuable means of communicating information – and that's a problem.

### Workforce Aging

Print companies surveyed by Printing Industries of America (PIA) reported that 30%-50% of skilled workers are looking at retirement in less than ten years. Many pressroom employees are mature individuals in their 50s or older. Replacing those human assets will be a challenge.

Though print companies are adding equipment like digital presses and software-controlled finishing devices to their production floors, most organizations aren't discarding the investments they've made in legacy software and processes. We've seen few operations that willingly scrap fully depreciated presses, folding equipment, or cutters to bring in the latest and greatest the industry has to offer. In most shops, the shiny new equipment is running alongside machinery that doesn't feature artificial intelligence (or even a modern computer) to control its actions.

Print companies will still need employees that understand offset printing, color adjustment, plate making, imposition, and pre-press – at least for a while. Unfortunately, those areas of the business aren't very attractive for younger people in early stages of their careers. Trade schools aren't turning out students with those skills already in place. Print companies will have to train them.

### Recruiting New Employees

Use the advanced technology spreading through the printing industry to attract young people to the business. Focus on giving employees chances to learn practical applications



## Enhancing Your Communication Skills

Originally published in November 2019



Though people in the printing industry are in the communication business, they aren't always personally skilled in the art of information exchange. A brush-up on communication skills can make a big difference in how customers and others perceive company executives and other personnel, and how effective they are in their print business jobs.

At Gimbel & Associates, we conduct workshops and training to help our clients communicate with their teams, customers, suppliers, and other important entities. We teach printing professionals when to use communication channels and we conduct role-playing exercises to get people comfortable with enhancing their communication skills.

### When is Training and Coaching Most Needed?

One common scenario we encounter is when companies promote staffers from production line duties to supervisory responsibilities or to roles where they interact directly with customers or suppliers, without providing them training or guidance in the additional skills they need.

The skills that made them successful in operations, such as the ability to operate equipment and manage print jobs, aren't enough when they step into a position of authority. These individuals can benefit from coaching to improve their communication skills.

### Elements of Communication

Here are a few highlights from our comprehensive workshops:

When you talk to someone in person or via video conference, you are communicating in three ways:



1. With your **body language** and **facial expressions** (55% of communication)
2. With your **tone** of voice, accent, and speed of talking (38% of communication)
3. With the **words** you use (7% of communication)

The first things a listener will pay attention to are numbers 1 and 2 above. How you present yourself has a big impact on the effectiveness of your message. Next, audiences will notice your tone and how you deliver the message with your voice. Only after rapidly processing those first two elements will audiences actually listen to your words.

Note that when communicating in writing, the first two communication elements do not exist. You must use words alone to convey your sentiment and purpose. Pay careful attention to wording to ensure the message is understandable and is clear about what action you want the audience to take.

### When to use email or text vs. a phone call?

Our clients often ask us when to use email (or text) versus a phone call. Email is so quick and easy that print managers and supervisors are tempted to use it for every communication. The problem is that it can lead to misunderstandings.

Here are some situations when a phone call, a video chat, or an in-person meeting is more appropriate:

1. **You need to apologize** – Apologies carry much more meaning when you can say “I’m sorry” with your voice.
2. **You expect a lot of questions** – Handling questions in a phone call is more efficient. Relying on an email string bogs down the communication and can confuse matters even worse. If you need to clarify or confirm understanding after hanging up, then you can follow up with an email.
3. **You’ll be delivering complicated instructions** – If you must walk someone through a multi-step process, be patient and help them in real time on the phone so you can provide immediate feedback. Written instructions can be provided for later use.
4. **Your response is late** – Emails requesting an action by your company may have gotten buried in the inbox. It happens to everyone. When it does, people who were

expecting more prompt action appreciate someone who acknowledges the delay by picking up the phone.

5. **It's a personal topic** – Don't discuss personal matters via email. In person or phone conversations allow people to feel you understand the significance of the topic. They will appreciate the empathy.
6. **The message is really important** – Don't risk an urgent message being sidetracked by a spam filter or left unread in an inbox. When your message involves a deadline, be sure your contacts receive and understand your message. You can only do that with the instant feedback possible with personal communications.

The Gimbel & Associates Executive Communications workshops, including a unit on Crucial Conversations, cover much more about the art of communicating effectively. If you or your staff could benefit from a communications training class, please contact us.

## **Are Your Conversational Habits Helping or Hurting?**

Originally published in August 2017



True leaders create an environment and culture where people can speak, question, and contribute. They are the people who listen to peers, partners, and subordinates without judgment; even in difficult conversations including “bad news” or critical comments. Effective leaders want others to express their honest opinions and find solutions in dialogue that support larger goals.

Fear and embarrassment shut people down in work environments. Successful leaders avoid these roadblocks by making it safe for people to say anything. They resist temptations to end conversations by declaring winners and losers. In the bestselling book, *Crucial Conversations: Tools for Talking When Stakes Are High*, the authors stress the benefits of putting others at ease. The book suggests anyone can learn and foster the conversational skills employed by these natural leaders with training and practice.

Effective communication skills are key attributes that distinguish great leaders. As management styles have evolved from hierarchical to self-motivated teams, organizations of all sizes recognize how communication skills relate to business success.

Gimbel & Associates consultants often deliver difficult news to company owners and principals. After assessing their operations, we may have to share negative observations, like “*your capabilities need upgrading*”, “*your sales team is weak and needs training*”, or “*your workflow is inefficient*”. We must deliver this news in a way that creates dialog. If people feel compelled to defend the current situation, they are less open to change and will not benefit from advice about how to improve their organization.

Anyone in business faces difficult conversations such as delivering unfavorable performance reviews or addressing coworkers about their errors. In our personal lives we may find it necessary to confront a loved one about addiction or deal with difficult teenage behavior. Situations like these provoke **crucial conversations** with lasting impacts on relationships.

In their book, the authors define crucial conversations as interactions with the following attributes:

- **The stakes are high for the potential outcome**
- **Opinions vary dramatically**

- **Emotions run strong**

Everyone has been on the losing end of a poorly handled crucial conversation, where we were not heard, we were fearful and became silent or suffered a verbal attack. And many of us enter difficult conversations prepared for battle. We are ready to dig in our heels because we feel our position is right, and we must win at any cost.

Evolution trained our brains to react to perceived threats by fighting or fleeing. As leaders, we must learn to resist the fight-or-flight response in difficult business conversations. We are dealing with complex social issues not the physical threats of our long-gone ancestors.

Great communicators are people who:

- *Are clear about their objectives for conversations*
- *Understand the value of relationships with other participants*
- *Recognize crucial conversations and change their tactics accordingly*
- *Spot points in conversations when others are uncomfortable, go silent, or become aggressive*

In our professional relationships, we have all seen intentions go awry when someone steadfastly insists they are right. Gimbel & Associates consultants coach leaders to be effective communicators by teaching them how to state their personal purpose in relationship to others. Often, they must declare their goals for a project, a team, or a larger objective multiple times so they can gain alignment and agree on a mutual purpose.

Techniques covered in Gimbel & Associates workshops show participants how to speak persuasively, not abrasively. By the end of the session, workshop attendees know how to share their facts, tell their stories, and ask others to contribute by sharing their own ideas and asking clarifying questions.

Our workshops teach:

- *How to spot the warning signs that indicate safety is at risk*
- *How to notice various forms of silence and violence*
- *When to apologize to restore safety in conversations*
- *How to stop arguing and recognize there may be a third choice that is not yours or mine*
- *What to do when you reach an apparent impasse*
- *The surprising benefits of brainstorming to achieve mutual goals*

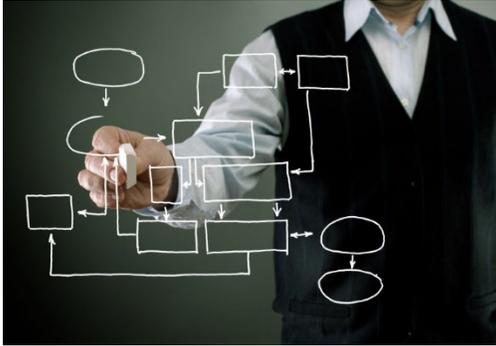
- *How to invent “mutual purpose” to sustain conversations until reaching a satisfactory conclusion*

Great leaders hone their communication skills. They enable better outcomes in difficult conversations by creating environments of collaboration and sharing. They make it safe for others to contribute. Effective communication skills separate great leaders from average managers.

Want to improve your organization’s communication competency? Contact Gimbel & Associates to find out how you can empower your team with the conversational skills they need to lead your organization successfully today.



## Powerful Production



- What services do you bill to your customers other than the cost per print? How do you define and sell the value of these services?
- How much emphasis have you given to the role of data in your operation?
- Have you thought of offering additional products or services that haven't been in your portfolio?

Print services providers must look beyond their traditional core product offerings and broaden their products and services. That's how to keep business growing as demand shifts from one area to another.



optimized to take advantage of the variable data capabilities offered by inkjet presses.

3. **Ink Optimization.** The cost of ink is the **most significant variable** in determining the overall cost for a job. Optimizing files to minimize ink usage while creating the desired image quality involves:

- Data and font analysis
- Paper testing, and
- Choosing the best ink option settings for the specific application.

Migrating legacy applications often requires testing and changes in the data stream to achieve the desired ink usage. Migrating legacy offset jobs to inkjet requires testing to achieve an effective decision making with the client to optimize cost. There are many ink options offered by the major inkjet press manufacturers, and new improvements are coming to the market regularly.

### Print Output

Print service providers seeking expense reductions from their inkjet investments must configure their applications for high productivity. When printers combine formerly separate cut-sheet jobs into efficient work units for continuous feed devices, they achieve their cost-cutting goals. Intelligent job-merging results in production efficiencies and cost savings. A plan to combine print jobs and minimize the number of paper stocks, with an eye on efficiency will generate the best results.

**Excessive paper changes will kill productivity on inkjet presses.** Print shop managers should strive for substrate standardization. They must analyze the legacy work migrating to the inkjet presses and then explain to customers how the use of standard stocks enables the advantages inkjet provides. Inkjet printing often requires shifting to a new paper to achieve optimal image quality. Choosing paper that will produce satisfactory results for most of the legacy jobs in the shop requires research and testing. Explaining a necessary paper-swap to customers involves positioning the options for image quality and the intended results for the application within the context of cost optimization.

### Finishing

Merging inkjet jobs with identical finishing requirements is a strategy print service providers must address to enjoy the most lucrative return on their inkjet investments. Finishing is often the bottleneck of document production. Changes to keep finishing equipment running without excessive operator intervention will allow printers the productivity gained in the printing step to continue through the finishing process.

When inserting is part of the finishing operation, printers will want to standardize on a single outbound envelope design to avoid envelope changes. Some mailers use double-window envelopes to support multiple customers or business units. Others add a digital inkjet printer to their inserting equipment, allowing them to customize the envelopes on the fly.

### **More than Just Savings**

Print service providers can reduce operational costs by adding inkjet to their facilities and modifying their workflow to leverage the technology. They can provide the ability for customers to improve the results of their print applications. Moreover, inkjet platforms bring a new level of customized content, impact, and effectiveness to printed materials. Enabling customers to reach their goals by improving their document production and delivery deepens customer relationships and opens the door for providing more services and new applications.

## ***The Gimbel & Associates Going Forward Guide: Creative and Production***

*Originally published in January 2018*



Departments in most companies often do their jobs independently. Marketing, creative, production and data groups exist in their own environments and are somewhat isolated from each other. Though this model has worked for a long time, things have changed in many verticals.

As print service providers migrate towards increasingly consultative relationships with their customers, coordination and cooperation among internal departments and external partners is becoming more important. Printers can distinguish themselves from the competition by delivering integrated solutions that produce measurable results. Customer situations are fluid and several departments and third-party partners must respond quickly to changing customer requirements.

**Creative teams and production departments must collaborate** to work out specifications and confirm they can produce the desired designs and formats within the allowed budget and turnaround timeframe. For complex projects the creative team may be at an agency or part of the end-customer's organization and they must collaborate with a print service provider to execute a project or program. Without effective collaboration, the production team will waste time and money on changing designs and graphics, or suffer the impact of high production costs or unacceptable quality or turnaround times.

- The **creative team** wants to leverage the latest techniques to wow the customer with their designs. They must also understand the limitations of production software and equipment capabilities and work within those constraints, which may seem overly confining. Often the creative teams don't understand the entire production process for documents and campaigns they are designing.
- **Production people** focus on getting the work done in the shortest amount of time, with minimum hassle, while maintaining high quality. If presented with files unsuitable for the production environment or production requirements impossible to fulfill, entire projects and campaigns can be at risk. Then everyone loses. Production staff needs to be informed about project objectives and customer strategies so they can help the creative team make design decisions consistent with production department capabilities. They can help the creative team leverage new technologies to produce desired results.

As is often the case when two groups have contrasting points of view, production and creative departments may not appreciate the work each does to bring a project from concept to delivery. They may be critical of the other group's lack of understanding which leads to uncooperative working environments. This forces each department to fend for themselves or creates adversarial relationships with conflicting purposes.

### Two Departments – One Outcome

Creative develops concepts, messaging, and formats consistent with the brand. They gather and secure variable assets like photographs, set criteria for variable substitution, and identify the unique messages and graphics relevant to the campaign's audience segments. They must be familiar with preparing art files, fonts, colors, finishing, available data, and many other details. The creative department produces the final artwork.



Production must be able to determine the requirements of each job, and institute effective techniques to set-up and automate production. They must be able to understand design, data, color, and substrate requirements to achieve the desired outcomes. The production department must evaluate the paper and media in relation to ink coverage and review folding, finishing, and postal requirements. They establish testing and

quality control measures and set the production schedule.

### Gimbel & Associates Best Practices and Success Strategies

Communication is the key to accomplishment. Lack of communication often leads to failed or difficult campaigns and projects. Interaction and alignment between multiple departments, and often multiple companies, is critical for project success. Successful teams should have

- **Clarity on Project Goals.** Assemble brainstorming, cross-functional teams that establish well-defined project goals. Define the project's measures for success. Creative and production should enable all team members to have ownership of the project and their roles in the overall plan.
- **Communication Platform.** Use a collaboration tool so team members from different disciplines can see documentation, provide input, and review other team members' comments. A common platform eliminates misunderstandings and keeps people on task.
- **A Crawl, Walk, Run Approach.** Most successful projects start small, before they are refined and expanded. Don't burden teams with overwhelming complexity when implementing new strategies and programs.

- **Workflow and Project Diagram.** Create a visual plan for the project and campaign. Many people learn better with pictures and visual aids. Plot each step, including all the branches, options, or decision points. This allows people to collaborate and bring new ideas for improvements.

Leaders are responsible for creating environments where the creative and production departments are focused on common goals and objectives. Projects are more likely to succeed when everyone understands the big picture and leaders facilitate internal and external communications with partners. Strong leaders identify and support cross-functional teams to work on projects. They acknowledge and give credit for collaborative efforts. Creative and production teams both win when great designs are well produced and generate measureable results.

## Is Data Quality Your Responsibility?

Originally published in March 2019



When it comes to variable data, most printers just accept what they get from their customers. But should they attempt to improve on the data to increase campaign effectiveness? We think that is a good way to add value to the customer relationship.

Simple data quality processes added to the workflow can make your client's outbound communications more effective and add billable line items to your invoices.

Address standardization and move update processing are common steps you're probably already taking to follow USPS regulations and to qualify your mail for workshare discounts. But you could take this operation a few steps further by using Delivery Point Validation (DPV) to ensure that, besides bearing a valid address, the mail is actually deliverable. Or you could apply suppression lists to remove deceased or incarcerated individuals from the list. Actions like these will improve your client's return on their investment in mail and encourage them to run future direct mail campaigns.

In a personalized multi-channel world, bad data affects more than just mail deliverability. You can make other adjustments to boost response and conversion rates for your clients' marketing campaigns. Look beyond the logistics of getting documents printed and mailed and consider the objectives of each project. You will uncover opportunities to improve the quality of the client-supplied data that drives the variable content in printed and digital communications.

### Geolocation

Are you creating campaigns that count on people visiting a physical store to generate the desired results? Try asking the client how far their customers typically travel to make a purchase. Compute the distance between prospect addresses and closest store locations. Then filter out any prospects unlikely to make the trip. Or try adding variable maps showing routes to the nearest store from each prospect's home.



### Salutations

In a sales letter, the salutation is the first thing a prospect sees. Get it wrong and the rest of the communication may not matter. Specialized software can assess the data and construct

salutation lines for you to insert into printed or electronic messages. With this step you can avoid obvious errors and turn salutations like *“Dear John Michael David Smith III”* into *“Dear Mr. Smith”*.

### Case Conversion

Data files are full of records with improper casing. The problem has gotten worse as customers use mobile phones as data submission devices. People seem inclined to type everything in lower case. It is best to seek software specifically designed for this work. Crude attempts at case conversion, where the software capitalizes only the first letter of each word, produces results like *“John Mcdonald, Vp of Sales, Xyz Company”*. Such clumsy attempts at case conversion foil efforts to make personal connections with prospects. The piece may get delivered, but what are the chances of producing the desired result?

### Genderizing

Genderizing means using different versions of messages or offers for men and women. A third version can be designed for recipients whose gender is not known. Each version should be designed to appeal to the targeted audience. With digital printing techniques you won't even have to split the file to print variable data documents while maintaining the postal sort sequence.

Sometimes, identifying the message recipient's gender can improve response rates. Good genderizing software will assign a gender to a record along with a confidence score. If the software can't decide if a name is male or female the confidence score will be low.

As a print/mail service provider your client's data quality isn't your responsibility. But it is an opportunity to add value and create strong connections with your clients. Inspect the next data file your clients send to you and see if correcting or enhancing the data is the right move to help clients achieve their objectives for the project.

## Data Security Challenges in Your Print Environment

Originally published in August 2019



Every aspect of our lives is driven by data. The need to protect and secure this data is becoming increasingly critical.

Privacy is a core market differentiator for some companies. Businesses need to prove to their customers that they handle data securely and ensure the protection of privacy.

What constitutes a violation of privacy? It's not always obvious, and interpretation can vary based on the application, industry, etc.

For example, a newsletter sent by a health care company to its customers might normally be considered marketing mail, but if the content is based on the recipient's health conditions (e.g., "Living with HIV"), it could be interpreted as sensitive data.

The production print industry faces unique data security technology challenges. Print shops are becoming marketing hubs, with more of the campaigns they produce involving variable or personalized data.

There is a trend toward personalization and customization in marketing, so digital print work is increasingly data driven – not just with a name and address, but also with personalized customer profiles.

Print services providers are often in possession of Personally Identifiable Information (PII) that can potentially be targeted and stolen.

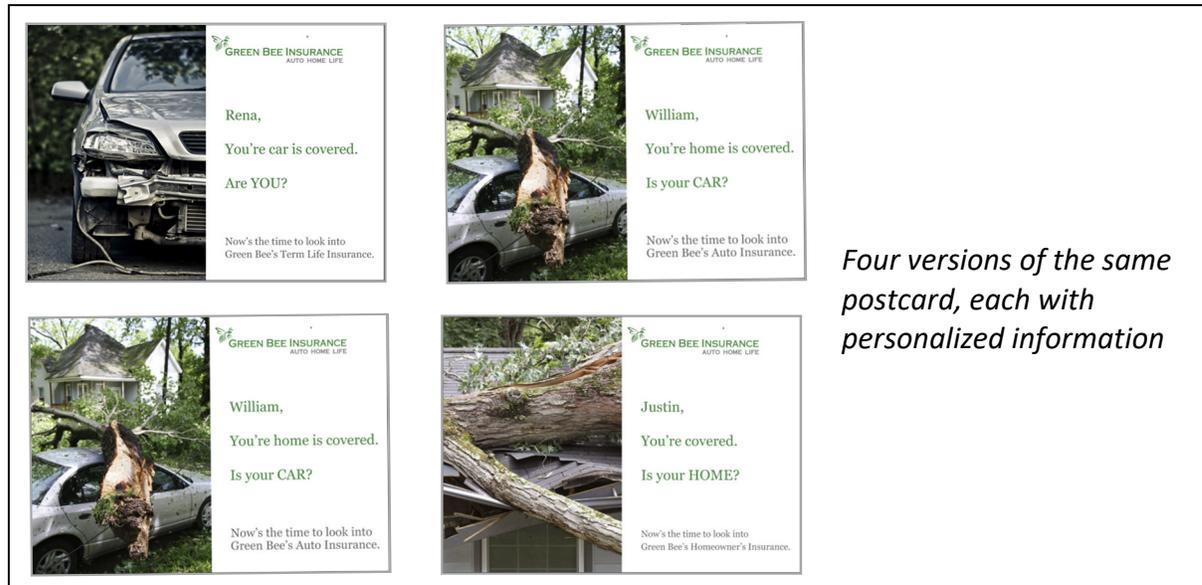


Have you considered these potential causes of data loss?

- *Loss or theft of laptops and mobile devices*
- *Unauthorized transfer of data to USB drives*
- *Improper categorization of sensitive data*
- *Data theft by employees or external parties*
- *Printing and copying of sensitive data by employees*
- *Insufficient response to intrusions*
- *Unintentional transmission of sensitive data*

## The Gimbel & Associates Going Forward Guide: Marketing and Data

Originally published in December 2017



A typical print production organization encompasses several internal entities that are often distinct and isolated from one another. Your company's departments may include groups dedicated to marketing, creative, production, and data. In the past, disassociation among these groups was manageable. Some departments even found it acceptable to maintain mild adversarial relationships; they just didn't see things the same way, but arms-length interactions didn't influence the ability to do business.

Things have changed. Today's most successful enterprises are reaping the benefits of bringing their internal groups together. They are creating a competitive advantage by speeding time to market and delivering high quality products in an environment where print service providers are forging deeper relationships with their clients. In this article we will concentrate on the ties between marketing and data.

Though it might be obvious that nearly all modern marketing efforts are data driven, full-fledged collaboration between the marketing people and the IT folks isn't automatic. They pass information to each other, but the effort is mostly of the "throw it over the wall" variety. They rarely join forces, and each group may perceive the other as unrealistic, demanding, or uncooperative. When either group is pre-committed to their independent approach, disagreements and last-minute adjustments detract from the project's success.

When working separately, marketing has been known to purchase tools and systems rather than rely on IT. Besides propagating duplicate functionality and introducing hardware or software uncovered by corporate security and standards, these moves cause friction between the groups.

## **IT is from Mars, Marketing from Venus**



The latest promotional innovations are always attractive to the marketing staff. Trends move quickly in their world, so when they identify a need they usually want their solutions implemented at once. IT takes a methodical and calculated approach to their work and wants to build stable solutions that last, which can take a long time. Harmonizing ideologically opposite cultures is

highly beneficial, but not always easy.

The joint efforts of marketing and data are necessary to define the audiences your company will strive to reach. Marketing typically creates a strategic plan and identifies segments. They set the parameters for research and information gathering, manage the budgets, and analyze metrics.

Corporate data people bring value to collaborative projects by analyzing in-house and acquired data. They will clean it up to remove duplicates and irrelevant information and enrich the data with modeling and appending techniques. The techies need to realize engineering every application perfectly so it integrates seamlessly within the corporate computing environment is sometimes unnecessary. Marketing campaigns have short life spans. Modest technical specifications may be sufficient.

For their part, marketing specialists must appreciate the support, licensing, and administrative costs of maintaining a diverse set of software solutions. Tight controls are sometimes necessary to prevent privacy breaches or computing system intrusions.

When IT and marketing work together, a cross-functional team can match technical resources and software capabilities with marketing plans. Joint decisions about investing (or not investing) in servers, communication networks, software, or outside experts are likely to yield the best results.

Throughout most of history, IT has developed solutions from an inside-out perspective. The technical staff only considered client impact after investing in design and programming. In contrast, working on projects with their marketing counterparts from end-to-end provides programmers the opportunity to start with the ideal result in mind and work backwards.

## **Gimbel & Associates Best Practices and Success Strategies**

Communication is the key to accomplishment. Lack of communication often leads to failed or difficult campaigns and projects. Interaction and alignment is critical for project success.

Successful teams need:

- **Clarity on Project Goals.** Assemble brainstorming, cross-functional teams that establish well-defined project goals. Define the project's measures for success. Marketing and IT should enable all team members to have ownership of the project and their roles in the overall plan.
- **Communication Platform.** Use a collaboration tool so team members from different disciplines can see documentation, provide input, and review the other team members' comments. A common platform eliminates misunderstandings and keeps people on task.
- **A Crawl, Walk, Run Approach.** Most successful projects start small, before they are refined and expanded. Don't burden teams with overwhelming complexity when implementing new strategies and programs.
- **Workflow and Project Diagram.** Create a visual plan for the project and campaign. Many people learn better with pictures and visual aids. Plot each step, including all the branches, options, or decision points. This allows people to collaborate and bring new ideas for improvements.

Leaders at printing companies are responsible for creating environments where the marketing and IT departments are focused on common goals and objectives. Make sure everyone understands the big picture and facilitate internal communication. Form cross-functional teams to work on projects and dole out praise and credit for collaborative efforts.

## Why is Data Still a Four-Letter Word?

Originally published in September 2018



Highly personalized and customized print communications that drive customer engagement have won awards and been featured in highly acclaimed case studies for decades. Marketers have experienced response and conversion lift when they leverage variable data. This phenomenon has been documented many times.

Why are so few of these campaigns executed? Most direct marketing programs do not leverage the demonstrated power of data. What is it about variable data that keeps marketers from using it to their advantage?

One contributing factor may surprise you, but it could explain why you can't convince more of your customers to dip their toes into the realm of personalized variable data printing.

### Why You Can't Sell Personalized Campaigns

Many creative people are actually averse to using data. They don't want to talk about data. The first mention of data management or Excel spreadsheets can make the creative crowd uncomfortable. It is almost as if data is a swear word unfit for mixed company. Fear of data, at least among this group, is real.

For years, smart print service providers have been trying to convince their agency clients to execute more complex print and direct marketing programs. They've had limited success. Often the individuals print salespeople engage in those conversations are print buyers at an agency or a creative person involved with an account. These people aren't responsible for data and they have no stake in the results of the programs for which they are buying. Their focus is getting projects done fast and at reasonable prices.

So how can print service providers encourage creative types to talk about digital print opportunities without scaring them off? We suggest focusing on the results instead of the process. Agency people love seeing samples of innovative printing techniques produced with technologies like inkjet. Print service providers need to translate data opportunities into visual samples that show the power and visual appeal of documents based on data – without talking about how it is done.

### Leave Data Conversations Back at the Shop

In general, agency people don't know what data to collect. The prospect of storing and manipulating data mortifies them. Creative people understand about targeting customers

via demographic profiles or buying history, they just don't want to discuss the details. They have read about data breaches in the news and are wary about taking responsibility for sharing customer data that hackers could access.

When speaking to creative types print service providers should consider reframing their offerings. Remove technical-sounding phrases from your sales presentations. Instead of discussing data manipulation, show prospects samples of targeted communications you can produce for them. Consider avoiding the "D-word" altogether. It is unnecessary to show them how you make the sausage.

When creatives and agency people see the visual impact of data, they will understand the power of personalized campaigns. When they get excited about the new opportunities for print, others will join the project team. Often the designer or print buyer can then refer service providers to the person in their organization who can assist with accessing the data necessary to do personalization.

### **Reduce Data Fear and Sell More Print**

Agency creatives and print buyers are important contacts. Print service providers need to demonstrate the value of data, personalization, and the power of print without discussing the intricacies of data processing. Everyone wants to see, feel, and understand cool new print applications. Defer the data conversation until the customer is sold on the results you can provide. Educate customers about the power of print and new digital applications during the sales presentation.

The benefits of personalization and variable data application in marketing are clear, but most campaigns don't make full use of available data and technology. By showing creative people samples of materials targeting groups and individuals with highly relevant messaging and images you can sidestep an obstacle that may be holding you back. The solution may be as simple as saving the data conversation for later.

## Wide Format for Transactional Printers? Not as Crazy as it Sounds!

Originally published in May 2019



Printers who create transactional documents rely on established workflows designed to generate millions of variable documents containing sensitive information like billing and payment amounts, purchases, insurance claim information, utility usage, or medical procedures.

No wonder they have trouble imagining that their operation could successfully run low-

volume wide format print applications like banners and signs.

High-volume transactional and low-volume wide format applications seem to have nothing in common. But is that really true?

Though the devices are different, printers produce wide format jobs on digital devices, just like transactional documents. Color and resolution is important in both cases, and both require strenuous quality control processes. Mistakes in each genre are expensive. In the high speed world of transactional documents, errors are quickly applied to thousands of documents resulting in waste, reruns, and embarrassment. When a sign printer makes a mistake, it takes a long time and lots of ink and material before it becomes visible. And nothing is more embarrassing than an error that's ten feet wide!

### Transactional Printing Trending Down

Volumes of transactional print are decreasing every year while large format print is growing at an annual rate of over 11%.

That's why it makes sense for transactional printers to consider adding wide format to their schedule of services. Gimbel & Associates has spoken to several printing companies who are concerned about shrinking revenues from transactional documents. Wide format definitely interests them. Diversification is an effective strategy, and wide format is an interesting area of opportunity.

### Easy Entry into Wide Format

It may not be feasible for transactional document printers to immediately run out and buy wide format devices for their production facilities. There's a less dramatic way to get into the wide format business that allows printing companies to experiment with the concept without committing to huge capital expenditures.

We recommend outsourcing this work to well-established commercial print providers willing to produce custom signs, banners, car wraps, and other types of materials at wholesale prices. Some of these companies operate regional print centers established for just this type of relationship. This way, transactional printers can offer services to their existing customers. They needn't worry about the pressure of selling enough wide format work to pay for the company's investment in new print devices.

If the business takes off and you can justify bringing the work in-house, go for it! If not, continue subcontracting the work while your company uses these applications to boost revenue and strengthen relationships with your transactional document customers who also have needs for wide format printing.

### A Competitive Advantage

Here's a great example of how these two printing technologies can reinforce each other:

Suppose your company prints and mails water bills for a municipality or property tax bills for a county. Those applications are always at risk, as government entities strive to lower their costs. Regulations may force governments to solicit bids when contracts are approaching expiration and could require them to award the work to the lowest bidder.



That's not good news for the incumbent print/mail service provider. A competitor offering savings of only a few cents per bill can lure the customer away from you. To keep the business, you might find it necessary to accept slimmer profit margins.

Government entities always need signs, wraps, and banners for community events, official vehicles, buildings, and public places. The wide format content and transactional document jobs can solidify the account and differentiate your company from competitors.

### Protect Your Business - Diversify!

Wide format printing and signs offer more attractive profit margins than transactional printers can ever expect to enjoy for the work their customers view as a commodity. Adding wide format to your business would be a wise move that protects your company from shifts in technology that could cause sudden decreases in transactional document volumes.

Not sure where to start, how to sell wide format, or who to contact as potential sub-contractors for doing this work for you? Contact Gimbel & Associates. We have the

answers and the connections that will help you expand your business in this growing area of opportunity.

## Questions Printers Wish Designers Would Ask

Originally published in March 2020



Printers understand about the impact printed items can have on people. Interacting with print involves multiple human senses including smell, touch, and hearing - besides the visual aspect. Designers that concentrate mainly on digital mediums may not realize how to get the best results from their printed projects. They don't know what they don't know.

Printing can involve complicated and exacting specifications that creative people must take into consideration during the design process. Informed designers working closely with printers will produce the most desirable outcome. Dialogs that begin with the questions below create favorable collaborations.

### At what point in the design process should I consult with a printer?

Start talking with the printer as early as possible in the project. This is especially important for designers who have limited print design experience. Decisions made early in the design process can have a huge effect on print production. Poor design choices impact quality, timing, and cost. Printers can show how to leverage variable data and images, suggest ways to save money on finishing costs, or help design pieces that meet postal regulations and qualify for postage discounts. With print it is often helpful to begin with the end product and work backwards through steps like layout and data acquisition.

### What can printers do besides print my project?

This is a great question to ask. Designers shouldn't view printers as a black box where designs go in and print comes out. Besides the actual application of ink on a substrate, printers are skilled at coordinating steps like bindery, delivery, or mailing list acquisition. Designers are frequently unaware that printers can also assist with tasks such as installing large graphics like banners or other display items, fulfilling orders for print-on-demand collateral or promotional items, or setting up landing pages and micro-sites. Printers can help with many details critical to a campaign's success.

### What do I need to know about color reproduction?

Designers typically work with the RGB (red, green, blue) color system, using their computers to create graphics for electronic display. Web pages, digital ads, and HTML emails all use RGB because that's how electronic devices display colors. Printing presses

create colors with CMYK (cyan, magenta, yellow, black). A graphic created for web presentation can look slightly different in print, depending on the chosen colors, the substrate, and the printing press technology. Designers must convert their digital files to CMYK before sending them to be printed. Exact color matching, using the Pantone Matching System (PMS) as a spot color is possible, but will increase costs. Spot colors are necessary in retail and packaging where a brand's color must be exact every time. In other applications, colors the CMYK color gamut can be reproduce will suffice.



### **What's the best way to send files to you?**

It's always best to send print-ready files. When printers need to manipulate or convert files, it will affect the budget. If timelines are tight, unanticipated re-work can cause delays. Designers commonly send files in the Adobe PDF/X-1a format. Always be sure to embed fonts. Missing fonts are a common mistake that causes production delays. Do not send native files like InDesign.

### **How should I proof the work?**

Printers recommend allotting enough time to proof the work several times before sending the files. Watch out for design elements like kerning and other type-related issues in addition to spelling, alignment, and text accuracy. Printers will provide digital online or printed proofs, but making type changes by this stage of the project can be expensive. Both these proofing methods allow designers to make sure they have included all the elements, positioned them correctly, and the colors are approximately correct. For exact color matching, ask for a press approval.

Print professionals are proud of the materials they create. They welcome opportunities to meet with creative people early in the design process because it helps them avoid unnecessary problems, expense, or delays at production time. By reaching out to the printer, designers can discover techniques and embellishments that make their creative projects stand out and create value for their clients.

*A version of this article was originally published on March 9, 2020 at:*  
<https://colorkarma.com/featured-articles/designers-10-things-to-ask-your-printer>

# Gimbel & Associates Alliances

International Printers Network	
Printing Industries of America	
Xplor	
PGSF	
What They Think	
National Print Owners Association	

## About Roger P. Gimbel



**Roger P. Gimbel, EDP**  
President, Gimbel & Associates

LinkedIn: <https://www.linkedin.com/in/rogerpgimbel/>

Twitter: [@RogerGimbel\\_EDP](#)

Office: (646) 472-1932

Mobile: (917) 414-3125

Email: [roger@rogergimbel.com](mailto:roger@rogergimbel.com)

Roger P. Gimbel, Electronic Document Professional (EDP), is President of Gimbel & Associates, a global consulting firm providing business development services and sales and marketing strategies to print providers and organizations. Roger founded the firm in 2003 and oversees a team of consultants with expertise in developing and facilitating sales training and sales process management, workflow analysis, marketing strategies, multi-channel campaigns, trans-promotional applications, MicroModeling™ data services and distributed print strategies.

Roger is a recognized authority in the digital printing industry, with over 40 years' experience as an accomplished printer and worldwide speaker at industry events. He has been a keynote speaker in the U.S., Latin America, Europe, Africa, India, China, and the Middle East, presenting strategies for sales and marketing in the digital print industry.

Before establishing Gimbel & Associates, Roger was Director of Worldwide Operations for Global Document Solutions, overseeing global sales and the operation of several print facilities. Previously, he was President of Xerographic Reproduction Center (XRC Inc.), a worldwide leader in digital print on demand.

Roger is a founding member of the International Printer's Network (IPN), the world's foremost alliance of leading companies in the printing, visual communications, and graphic communications industry. Having served as chairman of IPN for 10 years, Roger continues to serve on the Board of Directors and is currently the Director of Sponsorship.

Roger maintains his credentials as an Electronic Document Professional, which he earned from XPLO International (The Electronic Document Systems Association) in 2001. Roger was recognized for 10 years of service to the electronic document industry at the XPLO International Conference in 2011 and has been recertified through 2020.

In January 2019, seeing a growing need for wide format and signage, Roger formed the Gimbel Signage Group to assist in the production of signage for the ever-growing list of Gimbel & Associates clients.

In April 2018, Roger was elected to serve on the Print and Graphics Scholarship Foundation (PGSF) Board of Directors.

Roger holds a Bachelor's Degree from the New York Institute of Technology and was a member of its Board of Trustees from 1989–2003.

### Former Positions

- On September 27, 2016 Roger was honored to serve as the Master of Ceremonies for the Electronic Document Scholarship Foundation (EDSF) Give back @ Graph, their sixth Annual Scholarship Night fundraiser.
- On January 16, 2015 Roger was elected a director of the Electronic Document Scholarship Foundation (EDSF).
- On October 10, 2014, Roger accepted an invitation to join the Inkjet Summit Advisory Board.
- Roger has served as a member of the advisory council for the Xerox Premier Partners organization.

### Industry Awards

- *IPN Innovation Award*, January 15, 2020 by The International Printers Network in Tokyo, Japan. Gimbel & Associates received this prestigious award for sharing their concept for Strategies for Continued Growth in Print Services.
- *Honorary Certificate of Premier Partner Ambassadorship* in recognition of Xerox Premier Partner's Global Network Advisory Council contributions, 2014
- *Service Recognition* for ten years of service to the Electronic Document industry. Xplor International Conference, 2011
- *Lifetime Achievement Award* in recognition of leadership and personal contribution to the International Printers Network, 2005
- *Technical Excellence Award* at Mailcom, 2004
- *Pioneer of the Decade* for outstanding contributions to the digital printing industry, 2000





“In the future we will not be measured by the quality of the output, we will be measured by the quality of the outcome.”

– Roger P. Gimbel