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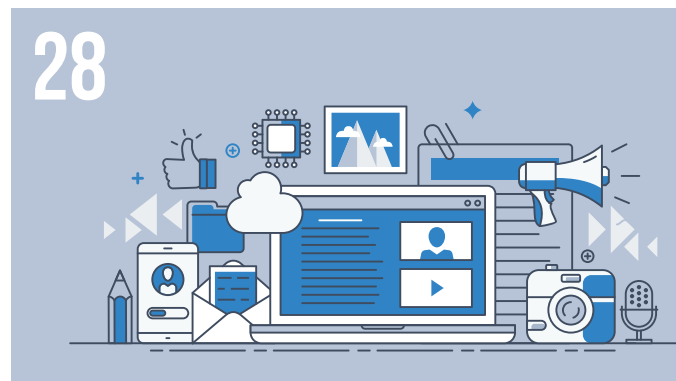
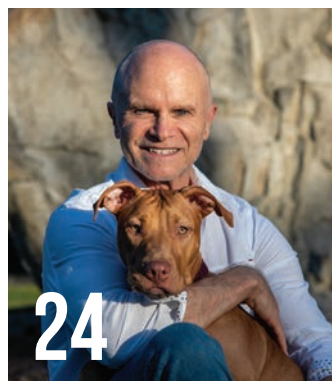
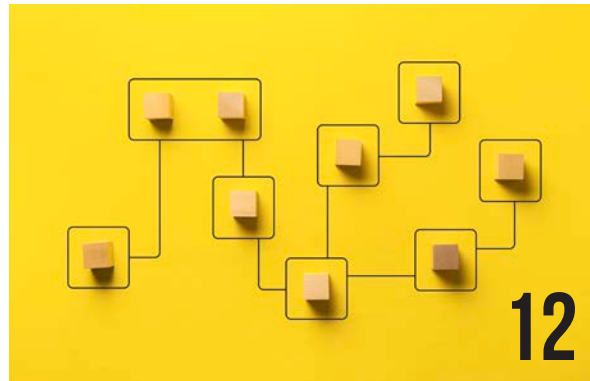
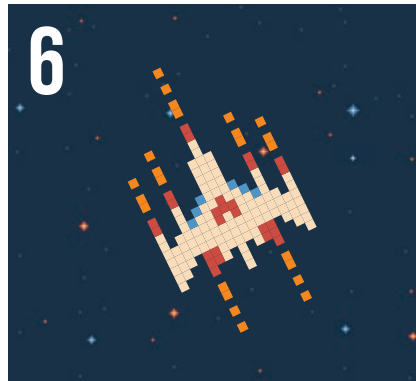


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Sellers and marketing content must provide value

SPRING 2023

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THE HEARTBEAT OF LEADERSHIP



Thayer Long
President, Association for
PRINT Technologies

As we move forward in this sometimes confusing and chaotic world, we can never lose sight of what empowers our missions. The idea of empowerment is becoming more important than ever in the business world and it has great merit within print. Empowerment is all about inspiring others to reach their full potential, whether it is your employees or your customers.

At a time when the print landscape is constantly evolving, it is essential for print leaders to think progressively and find new ways to motivate their teams. By empowering your employees, you can create a culture of innovation and collaboration that drives growth and success. And while it can feel like you are beating your head against the wall to motivate others, it is still the heartbeat of leadership.

Moreover, empowering your customers is equally important, especially in today's fast-paced world where customers are bombarded with a multitude of choices. By giving your customers the power to choose and control their experience, you can elevate their brand campaigns to new heights.

In this issue of Leading Print, we aimed to support you by highlighting sales ideas that are designed to empower your teams, strategies that can boost supply chain efficiency, and how direct mail is an amazing tool for customer engagement. We believe that these insights will help you build a strong foundation for success and take your business to new heights.

We understand that the world of commercial printing can be challenging, but with the right mindset and a commitment to empowering others, you can overcome any obstacle and achieve your goals. So let's embrace the concept of empowerment and not let go. Our industry is known for connecting on a deeper level. As leaders, we can never forget that it is our mission to make a positive impact on our employees, customers, and the printing industry as a whole.

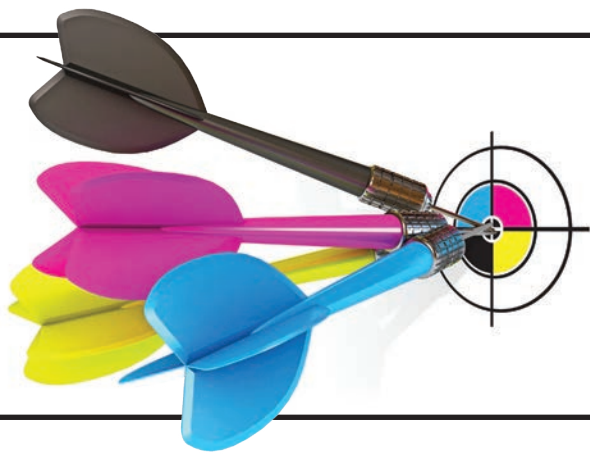
As always, we are honored to serve as your guide and resource for all things related to progressive leadership within print. We hope that you find this issue informative and inspiring, and we look forward to hearing your feedback.

Warmest Wishes,

A handwritten signature in black ink, appearing to read 'Thayer Long'. The signature is fluid and cursive, with a large 'T' and 'L'.



As leaders, we can never forget that it is our mission to make a positive impact on our employees, customers, and the printing industry as a whole."



REGISTRATION MARKS

DIRECT HIT

Enterprise marketers say their top challenges with direct mail campaigns are poor response rates and bad address data, according to recent research from Lob.

The report was based on data from a survey of 250 marketing professionals who work for companies in North America with 1,000 or more employees.

Some 36% of respondents cite poor response rates as among their top three challenges with direct mail campaigns, and 32% cite bad address data (up 25% from a similar study conducted in 2022).

Other key findings include...

DIRECT MAIL DELIVERS THE BEST ROI, RESPONSE AND CONVERSION RATES OF ANY CHANNEL USED

- ▶ 74% of marketers agree that direct mail delivers the best ROI of any channel used—up from 67% in 2021.

DRIVE MAXIMUM ROI WITH DIRECT MAIL AUTOMATION SOFTWARE

- ▶ 81% of marketers who use a software platform for direct mail agree it delivers the best response rate of all the channels their company uses today. This shifts to 70% for respondents who do not use a software platform.

OVER HALF OF MARKETERS HAVE MORE BUDGET ALLOCATED TO DIRECT MAIL THAN LAST YEAR

- ▶ 58% of marketers have more marketing budget allocated to direct mail compared to 2022. In fact, 67% of marketers have more than 10% of their total marketing budget allocated to direct mail marketing.



LEVELING UP

Marketers say the top improvements they're making to their direct mail campaigns are creating more appealing design, copywriting, and calls to action (14% cite); better integrating with their digital efforts (11%); and adopting new technologies (11%).

14%

More appealing design copywriting and calls to action

4%

Improve audience targeting

11%

Better integrate with digital efforts

4%

Improve quality of mailing lists

11%

Adopt new technology

2%

Use QR codes

9%

Increase personalization

2%

Limit waste of sends

7%

Use AI and/or automation

2%

Improve efficiency of overall process

6%

Improve vendor partnerships

1%

Establish company standards for variable data printing

5%

Improve data and tracking

1%

Incorporate variable printing

Source: <https://www.marketingprofs.com/charts/2023/48836/direct-mail-marketing-in-2023-top-challenges-and-trends>



POWERHOUSE

MODERN LITHO TURNS A PAGE

By Jeff Davidson

**Excellence. Heart for Service. Respect and Integrity.
Confidence. Optimism. Team Above Self.**

Every company has tenets that it lives by—attributes that are part of their core being, ones they hold each other accountable to each and every day. Between 2015 and 2020, Modern Litho was in the midst of a rapid growth spurt. With more than 85 years into the printing game and powered by a growing national client base, things were in a good place.

It was during this period that we collectively realized our need to become more intentional about our company's culture. Established in 1937, our Jefferson City, Missouri-based company with production facilities in St. Louis and Kansas City has established a reputation as one of the country's premier printers of specialized publications and catalogs for niche markets. We are a full-service, G7 Master Qualified Printer, delivering high-performance offset print, finishing and distribution of marketing and member communications, advanced variable data print, direct mail and mailing services.

Printing prowess aside, our company culture—who we are and what we stand for—sits at the heart of our success. As we sketched out ways to lean into more of what makes Modern Litho unique, we developed a well-defined Mission, Vision and Values statement that we measure every decision against. These values help us continue that “Unmistakably Modern” experience for our employees, customers and vendors.

What's Modern Litho's secret sauce? First, in my mind, we believe in the power of partnerships and strive to establish that level of relationship with customers and key suppliers. Second is our unwavering commitment to continued investment in people, equipment

and processes that positions us as a leader in print technology, production efficiencies and a high-quality customer experience.

"Strong relationships with suppliers and industry associates have never been more important or relevant than they have the last couple of years."

For example, after an acquisition in 2021, which effectively doubled Modern Litho-Kansas City's operation and market share, we realized our pressroom was not up to our standards for print production. Within six months of consolidating operations, we sold legacy presses and purchased and installed a new Heidelberg XL 106 8-color UV press.

The purchase of that press, which had not previously been on our radar, enabled us to live up to our customer and employee commitments to provide them our best. At the same time, it expanded our corporate product offering as we now are equipped with the most top-of-the-line 40" UV press that exists.



BUILDING PARTNERSHIPS THAT MATTER

Speaking to our partnerships with customers, being the best and staying the best rests in the depth of conversations we have. Understanding the world our customer lives in means we have to stay on top of all the changes that impact the industry and market around us.

Having conversations about manufacturing and print buying, and how they work together, takes expertise and intentionality. That is why our teams take a holistic approach to each project, always seeking to understand how the printed piece is being used.

Take a high-profile project our Jefferson City team recently completed in partnership with LEARFIELD for the NCAA Basketball Tournament game day programs. Though the job and logistics planning started many months before, it came to life on Selection Sunday when the field for March Madness was determined and seeded.

The goal was to print and begin delivery of 35,000 men's and women's tournament programs within 36 hours to multiple arenas throughout the United States. In order for that to occur, a number of the 144-page, perfect bound publications had to be out the door on Monday, less than 18 hours after final files were received.

Files were received, automated workflows kicked in and in a couple of hours we were on press. By 7 a.m., our production team had the first of the programs bound and staged for (PUR) glue curing prior to being carton packed and shipped several hours later.

A job like that makes us proud. The commitment, diligence and work put into hitting a deadline that could not be missed speaks volumes about the tenets that were thoughtfully crafted. It required meaningful organizational contributions from executives to truck drivers. Planning. Process. Execution. In the midst of March Madness, we scored big.

Sharing stories about our unique partnerships are the conversations we like to have with existing and prospective customers alike. It speaks to who we are—a nimble print organization equipped to deliver solutions for its customers—solutions that bring value beyond the printed page. And those stories always include our upstream partnerships.

Strong relationships with suppliers and industry associates have never been more important or relevant than they have the last couple of years. We are fortunate to have developed some incredible partnerships, including Vertiv, Heidelberg and Kodak, to name a few.



In a time of supply chain challenges, rising material costs, labor shortages and the like, these alliances have borne significant fruit and allowed us to thrive where our competitors struggled.

INVESTING AND GROWING FOR THE LONG-TERM

As a growth-oriented company, we look for organic expansion through customer acquisition and seek opportunities for strategic acquisitions that expand the company's marketplace presence and operational efficiencies.

At the same time, diligent investments in equipment, workforce, and product and service offerings result in a unique combination of quality, service and innovation, all with the purpose to keep the company viable and vibrant for the long-term.

"As we sketched out ways to lean into more of what makes Modern Litho unique, we developed a well-defined Mission, Vision and Values statement that we measure every decision against. "

While we have been tempted at times to break into areas outside our core services, we have stayed true to being a manufacturing-focused company and have augmented that with print-centric digital offerings like custom web-to-print portals and digital publishing.

An added strength is that each of our five production facilities has unique specialties and capabilities; but all also have redundancies that can be leveraged for added flexibility in meeting production timelines.

When it comes to innovation, we strive to stay ahead of the curve. We are currently participating with Kodak as an alpha site for a new MIS/ERP they are developing with several partners, including Microsoft, as an example. The model is not new to us, as we have been a beta site for Kodak as they have developed iterations of Prinergy and InSite. This keeps us at the forefront when it comes to streamlining our administrative processes and prepress workflows.

At Modern Litho, part of staying viable for the future means continual improvement in our stewardship of natural resources. We were among the first printing companies in North America to use the Kodak Sonora plate, which provides consistent high quality without the use of chemicals and chemistry, and reduces the amount of water used in the process.

In addition, we recycle 99% of scrap and production paper waste and hold FSC and SFI paper certifications.

Additionally, we are a part of Ameren's PurePower program, where we purchase REC's (renewable energy certificates) to offset the carbon footprint of power produced using fossil fuels.

The road ahead continues to be filled with the promises of even bigger and better things. Recently, my wife Jenny and I bought out the other shareholders to become sole owners of Modern Litho. The milestone is an example of mindful and diligent succession planning, which sometimes is a rarity in our industry.

With acquisitions being in our DNA, so to speak, Modern Litho has been a part of many other printing companies' succession and ownership transitions. The fact that our ownership group has done it with grace and an eye on the big picture to safeguard the business is a testament to the culture we set forth and our long-term commitment to employees, customers and vendors. ❖❖❖



Jeff Davidson, pictured with his wife and co-owner, Jenny Davidson. Jeff has served as VP of Corporate Strategy and GM of Brown Printing, a subsidiary of Modern Litho Inc. An integral part to the overall growth strategy of the company, he took the lead on the last three major acquisitions: James Printing in Kansas City (2018), Mulligan Printing in St. Louis (2020) and Watkins Lithographic in Kansas City (2021). In 2014, he was recognized as a "Top 20 under 40" printing executive by Printing Impressions. Since then, he has served on printing industry advisory boards and local nonprofit boards, most recently as the Chairman for the Jefferson City Area Chamber of Commerce.

The Flow

Supply chain best practices

The basic premise of building and maintaining an operational marketing supply chain (MSC) is simple.

Minimize risk, maximize efficiency in product creation and production, and effectively coordinate distribution.

Yet somewhere along the line, too many companies with too little knowledge or experience are tasked with leading the charge. When this happens, the stories of MSCs gone awry can be horrid. The market is flooded with tales of incalculable project delays, inventory miscalculations and fulfillment delays. More than anything else, when the MSC troubles hit the fan, marketers are left holding the proverbial bag.

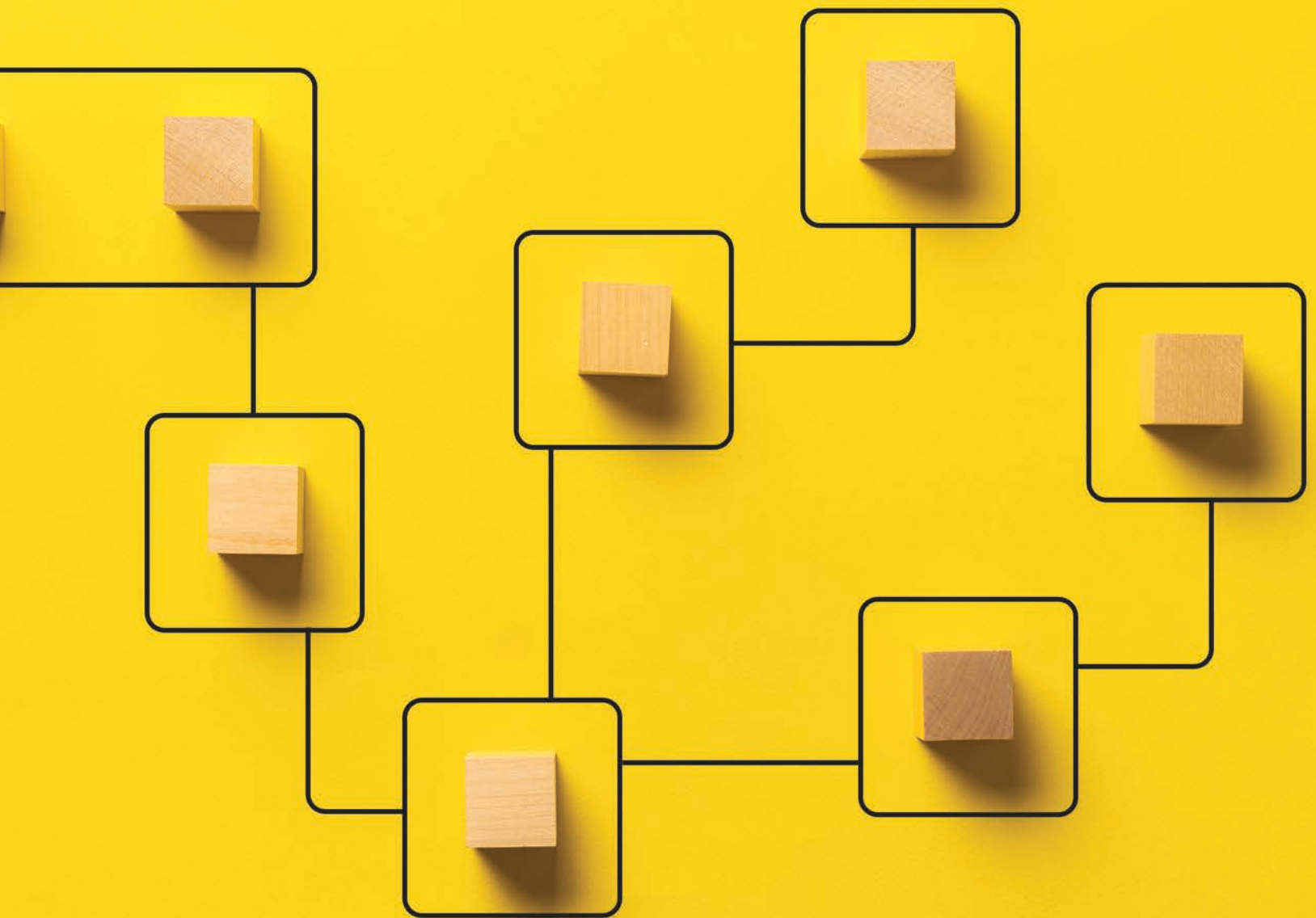
John Tenwinkle is the first to admit that the past few years have been unlike anything anyone has ever seen before. From the pandemic to labor challenges and manufacturing supply chain issues, at times, it seemed like something different happened every single day.

"Companies had to take a closer look at their marketing materials, and the dependency and necessity of them in selling their product or service," says Tenwinkle, Senior VP of Operations for Glendale, California-based 4over Inc. "We had to shift our marketing efforts in a few different directions."

"Emerging technologies are enabling companies to optimize their supply chain logistics, from inventory management to order fulfillment. This helps to ensure that marketing materials are delivered to the right place at the right time."

— Sherwin Poorsina, Executive VP, BR Printers

In some cases, 4over simply asked its customers to be patient as it worked through the challenges and offered substitutions. In other instances, the conversations geared more toward "We have stock and can deliver." Tenwinkle admits that it was highly dependent on availability of material on a specific week. "At the end of the day, we made sure our customers knew how volatile the situation was and regularly communicated with them to find the right solution."



In breaking down the ins and outs of marketing supply chain management, the first place to start is the realization that print complements an organization's marketing strategy. Agencies and organizations that have successfully marketed their product/service use multiple channels in their campaigns.

Understanding your customers' needs and how they want to communicate with your brand should drive your strategy. That being said, 4over has found that its most successful customers leverage data and technology tools to drive their success. That may mean smaller, more focused campaigns, more selective embellishments on their printed pieces or more personalized messages based on their customer base.

"It all starts with knowing your customer or target market and partnering with an execution organization that understands your needs," Tenwinkle says. "Thankfully, as an industry, the manufacturing supply chain issues have gotten much better. Communication and education are at the forefront. Finding a partner willing to help educate the buyer and design team is critical."

Tenwinkle says that when you can identify ways to optimize and leverage what print can do, you can collaborate to find ways to maximize your customers' spend and find the results they are looking for. "It all boils down to education and we, as an industry, need to intentionally drive focus on this."

Building the machine

When Sherwin Poorsina looks out over the increasingly growing need of effectively building a marketing supply chain that works, he finds solace in the emerging technologies such as automation and data analytics. The Executive VP of San Jose, California-based BR Printers says that each is having a significant impact on the marketing supply chain, enabling companies to streamline their marketing processes, improve efficiency and enhance the effectiveness of their marketing efforts.

“One way that automation is impacting the marketing supply chain is by automating various tasks and processes, such as content creation, distribution and reporting,” Poorsina says. “This helps to reduce manual labor and human error, increasing efficiency and speed in the marketing process.”

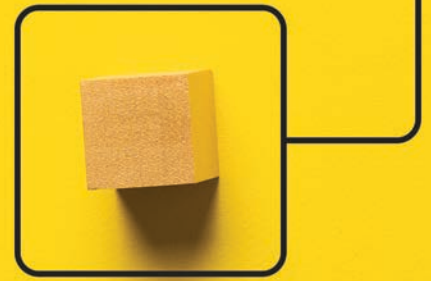
Data analytics is becoming another significant tool in the marketing supply chain arsenal. By analyzing data, companies can gain valuable insights into customer behavior and preferences, enabling them to develop more targeted and personalized marketing strategies.

Poorsina says that data analytics also enable companies to measure the effectiveness of their marketing efforts in real time, allowing them to make data-driven decisions and adjust their marketing strategies accordingly.

“Emerging technologies are enabling companies to optimize their supply chain logistics, from inventory management to order fulfillment,” Poorsina says. “This helps to ensure that marketing materials are delivered to the right place at the right time, reducing delays and improving the overall efficiency of the supply chain.”

"Communication and education are at the forefront. Finding a partner willing to help educate the buyer and design team is critical."

— John Tenwinkle, Senior VP, 4over Inc.



Identifying the future of MSC

To prepare for the future of marketing supply chain management, here are several steps you can follow:

Overall, emerging technologies are transforming the marketing supply chain, enabling companies to streamline processes, improve efficiency and enhance the effectiveness of their marketing efforts. By embracing these technologies, Poorsina says companies can stay ahead of the competition and deliver more targeted and effective marketing campaigns to their customers.

Some of the trends pacing the MSC landscape include:

Increased focus on sustainability — A growing demand for sustainable marketing practices is helping companies create opportunities to reduce their environmental footprint throughout the marketing supply chain. This includes using sustainable materials for marketing materials, reducing waste and optimizing transportation routes to minimize emissions.

Greater use of data analytics — As data becomes increasingly important in marketing, companies



Adopt a data-driven approach

Invest in data analytics and use data to drive decision-making across your marketing supply chain.

Embrace emerging technologies

Stay up to date with emerging technologies and evaluate how they can be integrated into your marketing supply chain processes.

Focus on sustainability

Seek ways to reduce your environmental footprint throughout the MSC process.

Optimize for omnichannel

Ensure your MSC processes are optimized to support an omnichannel marketing approach.

continue to leverage data analytics to gain insights into customer behavior, preferences and trends. This will enable companies to develop more targeted and personalized marketing strategies and optimize their supply chain processes accordingly.

Integration of technology — Emerging technologies such as artificial intelligence (AI), blockchain and the Internet of Things (IoT) will continue to play a larger role in MSC management. Companies successfully able to integrate these technologies will be able to improve efficiency and speed, reduce costs and enhance the overall effectiveness of their marketing efforts.

The rise of omnichannel marketing — Consumers are using multiple channels to engage with brands and companies are adopting omnichannel marketing strategies to reach them. This trend is likely to continue, and companies will need to ensure that their marketing supply chain processes are optimized to support an omnichannel marketing approach.


In the end, finding the right partner is critical to the overall success of the marketing supply chain management process. “If you haven't already, now is the time to find a trusted partner to help you optimize your spend,” Tenwinkle says. “The knowledge that once was internally at your customer's business may be gone, and that institutional knowledge went a long way. The good thing is there are plenty of strong organizations that can help customers strategize, navigate and demonstrate the value that printed marketing materials can bring to their organization. Results are critical when spending scrutiny is in place, and it's our responsibility to help place a value on the dollars they spend with us.”

With partnership paramount to success, finding a forward-thinking company to guide you in a direction to execute thoughtful and impactful material to your target audience is the ultimate MSC gamechanger. ❖❖❖



Leaders
discuss how
print companies
can succeed in the
current landscape

THRIVE



**"Clients want
transparency which
builds trust."**

**— Stacey Peluso-Slaney,
Shawmut Communications**

In today's ever-changing business landscape, it is more important than ever for print leaders to engage with their clients and demonstrate the value they bring to the table.

With new technologies emerging and the shift towards digital, it can be challenging to keep up with client demands and stay competitive in the market. To address these challenges, a roundtable discussion was held with print leaders to share their insights on how to effectively engage with clients and demonstrate value in the current landscape. The discussion covered a range of topics, including customer experience, personalization, and the role of technology in enhancing print offerings.

Stacy Peluso-Slaney is the Vice President of Marketing and Client Solutions at a leading printing and marketing services provider. With over 20 years of experience in the industry, Stacy has a wealth of knowledge on how to effectively engage with clients and drive business growth. Dave Pilcher is the Chief Executive Officer at Freeport Press, a top-tier magazine and catalog printing company. With a strong background in technology and print production, Dave brings a unique perspective to the discussion on how technology can enhance the print offerings and client experience. Finally, Maria Brock is the Vice President of Sales at FedEx Office, a leading provider of print and shipping solutions. With over 25 years of experience in sales and marketing, Maria has a deep understanding of the importance of customer relationships and how to demonstrate value to clients. Together, these leaders will share their insights and expertise on how print companies can thrive in the current landscape.

In today's landscape, what are the most effective ways to engage with prospective print clients?

Dave Pilcher: Real salespeople build relationships and find solutions for clients' needs. The solution must match the need. Not all printing companies offer the same solutions—the right equipment for the right job means the right fit. The right fit usually translates to a great long-term customer.

Stacey Peluso-Slaney: I am a firm believer that you need a multifaceted approach when engaging with prospects. One that adds value and provides the prospect with ways to educate and help them do their jobs more efficiently. This approach is a mix of outreach from social, email, print, dimensional, SEO, call, videos and personal touches.

Maria Brock: A recent Gartner study predicts that by 2025, 80% of B2B sales communications will occur on digital channels, and we have certainly seen that trend in our business. Social channels are becoming more important for reaching clients, and providing useful content on these channels to establish your business as an authentic leader is crucial. The beauty of attracting prospective clients this way is that providing content that is both useful to customers and relevant to your business solutions can help you attract better qualified buyers directly through the channels they are engaging.

How are you aligning your business with current and future market opportunities and what strategies do you use to stay ahead of the competition?

Pilcher: We focus on magazines and catalogs. The barrier to entry to compete is due to software, inventory, equipment, and distribution requirements. There are fewer and fewer printers that can do what we do. We see the market moving from "whoever has the paper gets the job" last year to "whoever has the capacity gets the job." We expect printer capacity to get especially tight this fall. We believe we can double in volume at our location over the next five to 10 years with the right clients and vendor relationships.

Peluso-Slaney: Our approach is to incorporate new trends into our sales cadence. We want to be part of a community where our ideal client participates. It helps us to understand their needs and ensure that they can serve and support them in a future partnership.

It is important to A/B test and tweak as needed our marketing strategies and outreach. When we have

success, we are sure to analyze it and understand why it was successful so we can repeat it! What really sets us apart from our competition is knowing our customer and the verticals that they engage. Our conversation with a medical device prospect is much different from someone in academia.

Brock: As our customers redefine the operations of their businesses to adapt to remote or hybrid work models, they are able to leverage our FedEx Office network now more than ever. At FedEx Office, we can leverage our print production and shipping networks to help customers reach the most convenient point of access to achieve custom business solutions for their print needs, as well as the changing needs of their remote employees and customers.

Can you identify any client trends, needs, and behaviors that are important for printers to consider when developing their marketing strategy?

Pilcher: Good marketing communicates capabilities, equipment, and services that can help clients understand if you're the right fit. But ultimately, in my opinion, people make the difference. I still believe in old-fashioned relationship selling for success.

Peluso-Slaney: It is imperative to have an omnichannel approach. Our clients would not use one source to outreach and we should not either. I would say video is such an important trend today. But most important is to arm your salesforce and SDR team with the ability to prospect easily and effortlessly.

Brock: We are seeing companies consolidate roles, meaning we are no longer calling on a "print buyer," but could be talking to anyone from marketing managers to facilities managers about the print needs of an organization. Because of this, these buyers may not have a background in printing, and rely on us to be experts in print and print solutions. This translates to a marketing strategy that focuses on efficient, frictionless buying, as well as offering a wide array of solutions for companies looking to consolidate their buying through fewer vendors.

How do you ensure and measure the value your company provides?

Pilcher: Customer loyalty is a good indicator. Each project is unique. It's custom manufacturing. Sure, it's signatures of paper and ink, bound and boxed or mailed—but the clients' requirements for paper, sizes, color, coatings, finishes, versions, binding, mailing,

boxing, and distribution differ. Getting that right creates value. No company is perfect, so if something goes sideways, stand behind what you do and make it right.

Peluso-Slaney: In order to bring value you need to understand their responsibilities and industry. Being an expert in a vertical is vital to bringing value to the client. The steps I would take to measure and demonstrate value is through direct and frequent communication with your prospect. You need to really understand what their expectations are in order to perform and provide value.

"Marketing can enhance the process, but I believe relationships do most of the heavy lifting in the success category."

— **Dave Pilcher, Freeport Press**

Brock: We listen to them! Our e-commerce and product development initiatives are driven by customer experience research. Additionally, our Sales team has a voice at the table as we continually prioritize development efforts, because they regularly hear directly from our customers about what they need. As large as FedEx Office is, it is amazing the creativity and flexibility we have when it comes to meeting our customers' needs. Through a kind of customer co-creation, we also respond to non-standard program needs to help build out new programs and solutions. When we see a series of one-off solutions that all look and feel the same, we know the solution has value to our customers, and from there we validate with research and build out a standard solution.

We have ongoing voice of customer (VoC) strategies and efforts that allow us to hear directly from our customers about what is most important to them. This also includes a disciplined cadence for ongoing business reviews with large customers, and, of course, tracking repeat business and program renewal is a powerful scorecard.

How do clients want to be communicated with today?

Pilcher: So many options, right? I still think there is value in face-to-face. Hearing someone's voice on the phone matters. But for quick communication, text and email works. I think faxing is finally dead. I enjoy creating a weekly email newsletter highlighting

industry news about advertising, catalogs, magazine, print, paper, postage, distribution and more. I've been sending that email out for over 10 years. For me, it's a labor of love.

Peluso-Slaney: Clients want transparency which builds trust. The print industry is custom manufacturing and things happen! You need to be proactive in your response and provide flexibility to adapt to the current situation. Having flexibility allows both parties to be part of the solution. Open communication is key to any great partnership.

Brock: We have seen clients preferring electronic communication for some time because discussions are documented. But as email inboxes become more crowded, many of our customers prefer the ability to track an order's status in an online portal environment where they can pull information on demand and review historical data as needed.

How do you measure the success of your marketing efforts, and what metrics do you use to evaluate your performance?

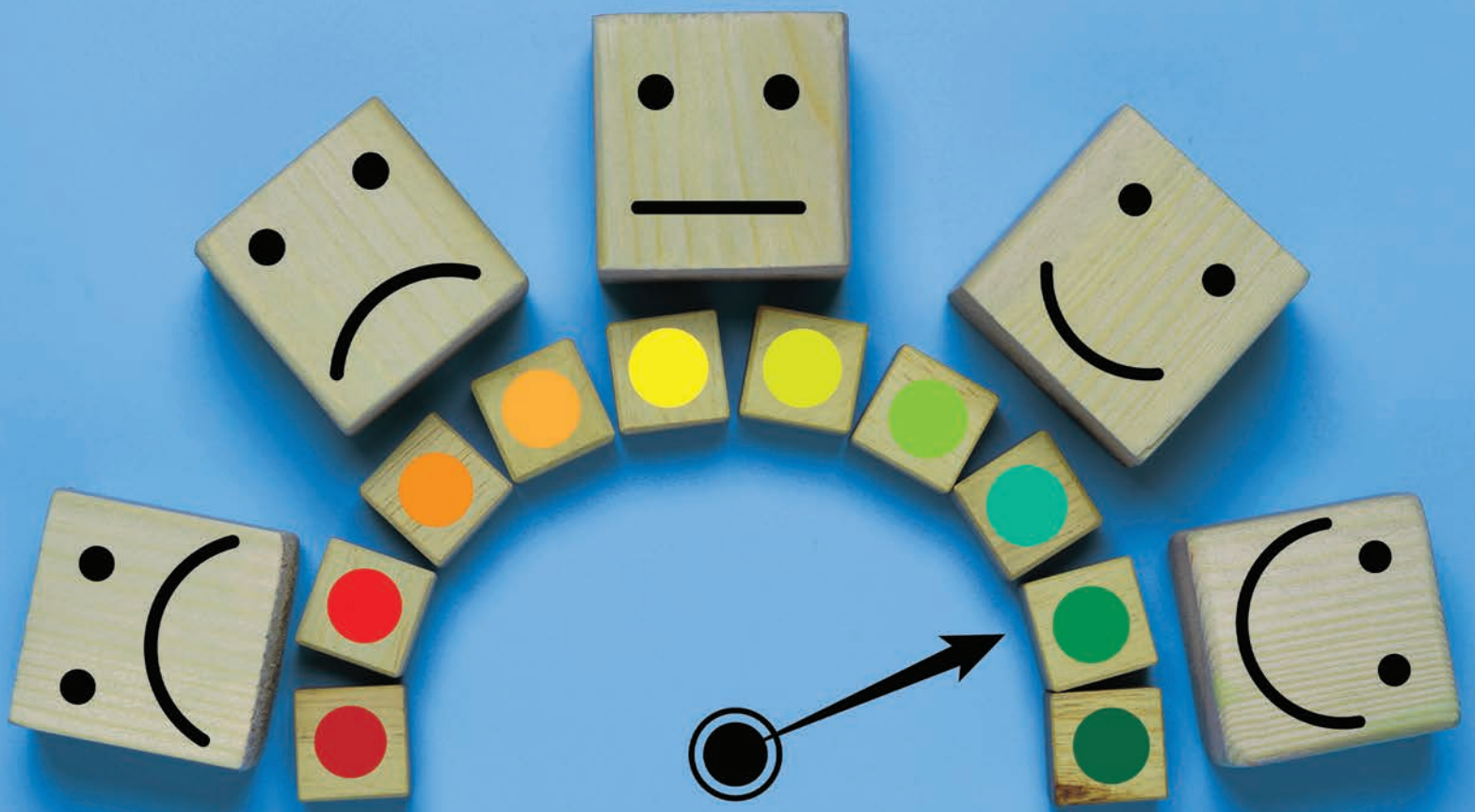
Pilcher: If sales are going up, you must be doing something right. Sales success equals retention plus new. Marketing can enhance the process, but I believe relationships do most of the heavy lifting in the success category.

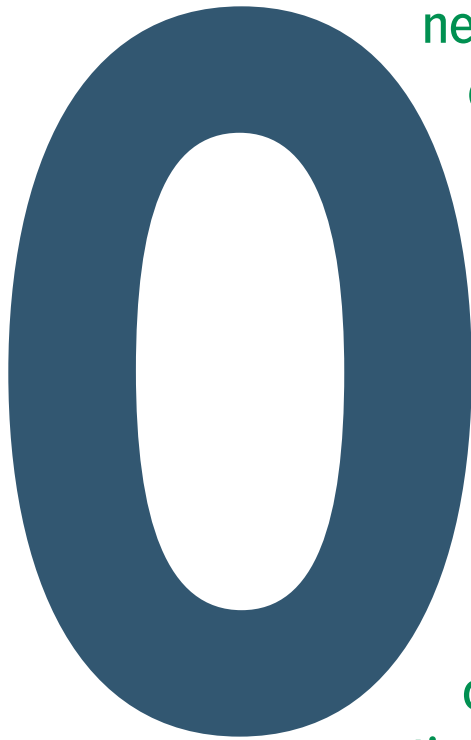
Peluso-Slaney: We measure success by a few things: discovery meeting, new customers, revenue generated from those customers, inbound leads, SDR Team efforts, form submissions, overall & sales growth. Because this information resides in various locations, I use Excel to chart and map out the progress of the success of each effort.

Brock: Most of our marketing efforts in the B2B space are very specific to a product or solution, so it's quite simple to track sales engagements that result from the use of certain materials. We use data-tracking tools to manage customer touchpoints, which allow us to track and adapt our sales plan for the customer based on the results we can observe. 📊

LASTING IMPRESSIONS

The importance of customer experience





One of the largest healthcare payers in the country had made a corporate commitment to deliver documents and content to its 49-plus million members in accessible formats. Its digital accessibility journey began by providing remediated healthcare documents, like explanation of benefits (EOBs), on an exceptional basis upon request by individual members. The documents, which sported an average size of four to five pages, were both costly and time-consuming to produce.

The process was not a great customer experience for those who needed alternate formats for use with their assistive devices, as customers who had requested special formats had to wait for delivery.

Eventually, the company decided to build out its technology infrastructure and workflows to create all high-volume, member-facing documents systematically as accessible PDFs. In 2020, the company delivered more than 350 million accessible pages to members via the solution it deployed. At the same time, it significantly lowered its production cost per accessible document from almost \$60 per document when completed manually to approximately \$0.06 per document.

Above all else, the healthcare payer dramatically improved its customer service (CX) by immediately delivering information its members expected to receive—or had requested on demand—in an accessible format without requiring them to speak with customer service representatives or chatbots.

This is the kind of customer experience that Scott Baker says today's brands must focus more on delivering. As the EVP of Strategy and Business Development for Crawford Technologies, he understands the fine line brands walk between winning and losing customers at the point of customer experience.

"An organization must be committed from the top down to delighting its customers if it hopes to consistently provide great customer experiences," Baker says. "By knowing its customers, understanding how its customers want to communicate with them—via which channels—and at what cadence their interactions should occur, gives customers confidence that they are 'more than a number' to their vendor. The efforts engender strong loyalty."

Research shows that customers are less likely to switch providers if they receive a great customer experience. For example, according to the "2023 Zendesk CX Trends Report," 70% of customers spend more with brands that provide a seamless experience between all points of contact. Similarly, 64% will spend more if their issues are resolved where they are.

"An organization must be committed from the top down to delighting its customers if it hopes to consistently provide great customer experiences."

— Scott Baker, EVP of Strategy & Business Development, Crawford Technologies

The bottom line is that the brands able to remove friction in interactions with their customers benefit from greater customer loyalty and less customer churn. According to the "CX Trends Report," 61% of customers are excited about experiences that are natural, convenient and fluid.

"Beyond being customer-centric, companies that measure customer satisfaction through NPS®, CSAT, etc., tend to deliver great customer experiences," Baker says. "These are the companies that have strategies and systems in place to ensure they understand their customers. They have methods to capture customer preferences and apply them, they have the ability to communicate with their customers through multiple channels with consistent messaging, and their various points of interactions with customers are integrated to capture a 360-degree view of their customers."

ESTABLISHING YOUR CX SPOT

Even before the pandemic, improving CX was emerging as a key driver for companies to better engage and retain their customers. Over the same period, it was clear that customers, whether B2C or B2B, had changed their expectations regarding how they were approached, informed and serviced. In fact, most actually valued CX more highly than the price they were willing to pay when they evaluated and chose a vendor.

As the owner of event production and experiential marketing agency Old City Media, Ray Sheehan has had a front row seat to the strategic planning and marketing needed to reach today's customers. This much he knows: The expectations and competition is much higher and competitive.

"If brands are able to identify this and create a better overall customer experience, those potential consumers are more likely to support your brand," Sheehan says. "Making a lasting impression is crucial. How can you stand out? One way is through experiential marketing. This gives you an opportunity to have a conversation with a potential customer. It gives you the opportunity to break down that barrier. Maybe you can provide or offer some valuable insight. Answer some important questions. That level of professionalism goes a long way as it relates to customer experience."

From where Sheehan sits, top-notch customer experience begins within the organization first—its company culture. The way you treat your internal

GETTING PERSONAL WITH CX

Immersive experiences are quickly becoming a key differentiator for brands wanting to stay competitive and ensure their customers remain loyal. According to the "2023 Zendesk CX Trends Report," customer experience (CX) is evolving into the new standard, redefining how companies engage with their customers. Here are some snapshots from the report:

70% of customers spend more with brands that provide a seamless experience between all points of contact.

62% agree that personalized recommendations are better than general ones.

60% say they can tell when they receive personalized recommendations and find them valuable.

73% will switch to a competitor after multiple bad experiences.

59% of customers want companies to use the large amount of data they have to provide truly personalized experiences that transcend typical marketing efforts.



team will manifest itself externally. Next comes the strategy of collecting customer service feedback and exploring the tools that can make your organization more sophisticated.

"Making a lasting impression is crucial. How can you stand out? One way is through experiential marketing."

— Ray Sheehan, Owner, Old City Media

This is followed by the process. When a potential customer starts that first touch point, what happens? Sheehan says you must follow that customer journey. "This will help you identify any customer experience pitfalls or areas of need. Plus, it is a great exercise to help define your lead funnel and if there are any breaks in the process."

Today, many brands are spending millions to improve their technology stacks to boost their CX initiatives. Intelligent chatbots. Customer data platforms (CDPs). Digital experience platforms (DXPs). Conversational AI and natural language processing. Regardless of the strategy, the goal is to capture all customer interactions in a centralized repository, analyze them, and to use the insights to deliver timely, personalized, customized "next best actions" or recommendations relevant to each customer.

As research shows, brands that excel in delivering great CX generate more revenue, experience less customer churn, realize superior customer long-term value (CLV) and foster exceptional customer loyalty. "That is why it remains incumbent that organization leaders connect the dots between delivering exceptional CX and the tangible business benefits on behalf of their colleagues and employees," Baker says.

In the end, more than anything else, the commitment to delivering exceptional CX must be a primary component of a brand's culture, i.e., customer centricity must be led from the C-suite. As customer interactions evolve to become mostly digital, removing friction from online customer interactions must be paramount.

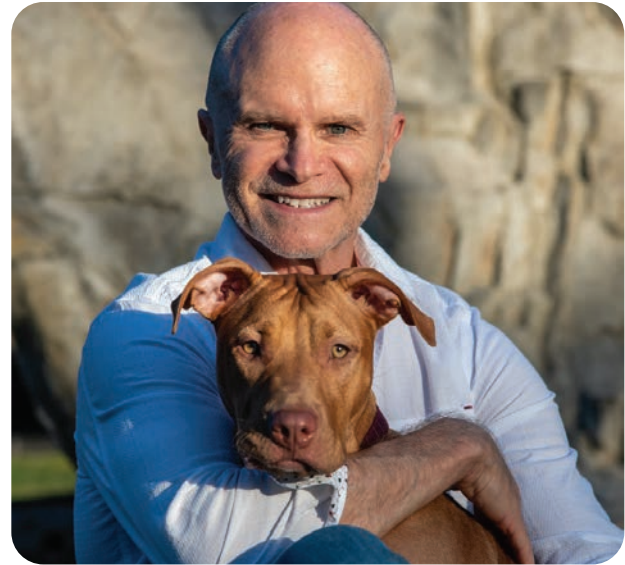
It remains important that brands know and understand their customers and their preferences so that they can build infrastructures and processes to give customers what they want, when they want it, and how they want it. 🍷

Q&A

DAVID DENNIS,
AUTHOR, GAMENESS

GOT GAME?: GAMENESS AUTHOR, DAVID DENNIS, SHARES LIFE LESSONS

In a world where the rules of success seem to be ever-changing, author and strategist David Dennis has developed a unique framework for achieving greatness in life and business. His new book, "Gameness: One Man's Struggle with the Truth, Power, and Politics of Business," is a gripping account of his own journey through the ups and downs of the corporate world, and the lessons he learned along the way. In this exclusive interview, we had the opportunity to sit down with David and delve deeper into the ideas and insights he presents in his book. We explore topics such as the importance of authenticity and vulnerability in leadership, the role of trust in building successful teams, and the power of perseverance in the face of adversity. David's candid and thought-provoking perspective on these issues is sure to inspire readers and provide valuable insights into what it takes to achieve success in today's fast-paced and competitive world.



What inspired you to write "Gameness"?

I was inspired to write "Gameness" for my children, or any other reader, that they may be spared from this danger of living a life so comfortable and soft that they will die without ever realizing their true potential!

All my life, I missed my dad, and I wished I could have had a conversation with him. His life advice, his lessons, his wisdom—these were all absent in my development and I felt it deeply. I knew I wanted a different outcome for my five kids, and I decided a long time ago that I would write down for them the types of lessons I wish I could have heard from my dad.

I did not want to simply leave a diary of reflections behind for my kids, however. I wanted to leave with them what I had come to believe through all of my life experiences and observations, the most important attributes or mindsets they would need to possess in order for them to have a fighting chance to live their lives to their fullest potential. Those attributes, or mindsets, are the four defining attributes of Gameness.

Equipping them with the tools needed to live their lives to their fullest potential was important to me because the happiest, most fulfilled, impactful, enjoyable, and often the most prosperous people I have ever met were all people who sought to live their lives to their fullest potential, and they all possessed Gameness.

In addition, I have witnessed countless lives stuck and unhappy over the years as a Licensed Professional Counselor, Marriage and Family Therapist and CEO. I observed a tremendous proclivity in our society (which only grows, by the way) on focusing on the pain of our past—our trauma, our wounds, our failures—more than the possibilities of our futures. I saw far too many people who saw themselves, and life itself, as problems to be solved versus potentials to be realized.

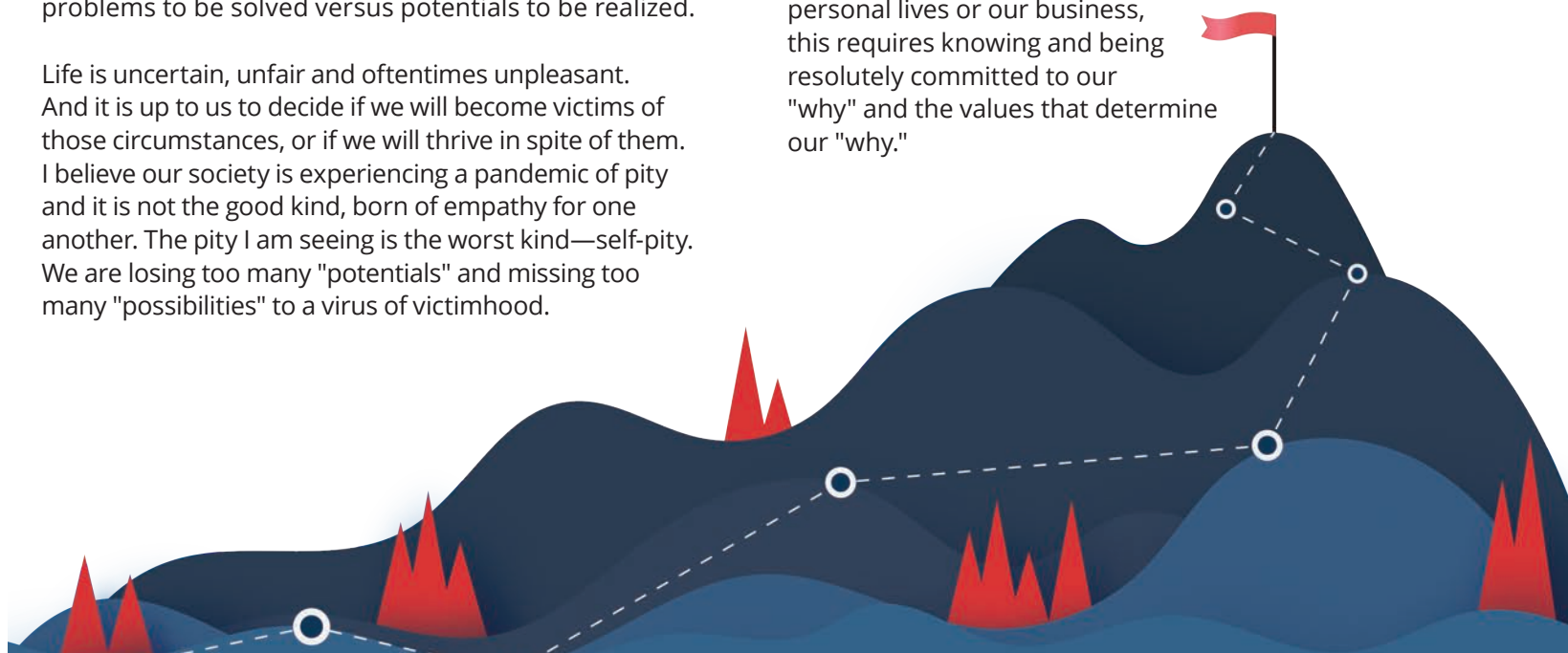
Life is uncertain, unfair and oftentimes unpleasant. And it is up to us to decide if we will become victims of those circumstances, or if we will thrive in spite of them. I believe our society is experiencing a pandemic of pity and it is not the good kind, born of empathy for one another. The pity I am seeing is the worst kind—self-pity. We are losing too many "potentials" and missing too many "possibilities" to a virus of victimhood.

Can you explain the concept of Gameness and how it relates to both personal and business development?

Gameness is a "take dominion" philosophy of life and business that is guided by the four core attributes of Gameness:

Never-quit mindset, which means we see detours to our dreams, not dead ends, when a path we are on ends. It is about learning to upgrade our perspective to "see things better," even when we can't "see better things" yet!

Resoluteness to purpose, which means our efforts are guided by our life purpose, or a clearly defined mission, vision and values. Whether it be our personal lives or our business, this requires knowing and being resolutely committed to our "why" and the values that determine our "why."



"YOU ARE IN DANGER OF LIVING A LIFE SO COMFORTABLE AND SOFT THAT YOU WILL DIE WITHOUT EVER REALIZING YOUR TRUE POTENTIAL." – DAVID GOGGINS

Q&A

DAVID DENNIS, AUTHOR, GAMENESS

Fighting spirit, which means tackling our problems, not dodging them. This is an approach of life and work that trains us to see problems as something that "grows power in us" versus "having power over us." Living and doing business with a fighting spirit means we acknowledge, even expect, each day to present us with adversity that will demand something from us. And our responses can be one of three: Surrender to our problems, try to survive them, or subdue them! Gameness is more than resilience; it is actually thriving or becoming better because of problems we encounter as we determine to become wiser, stronger, or more resourceful due to lessons learned during adversity versus becoming victims.

Will require you to act beyond feelings, which means mastering your performance, and this means mastering your feelings. It is living and working governed by our purpose and goals, not our feelings or circumstances. It is learning that there are no free endorphins. Seldom does anyone "feel" like going to the gym to work out, but everyone feels good after working out. Life or business success is impossible without discipline. Success feels great, discipline does not usually feel great. But, to quote Jocko Willink, "Discipline is freedom!" This is about fostering a mindset of acting ourselves to new ways of feeling, versus foolishly attempting to feel ourselves to new ways of acting.

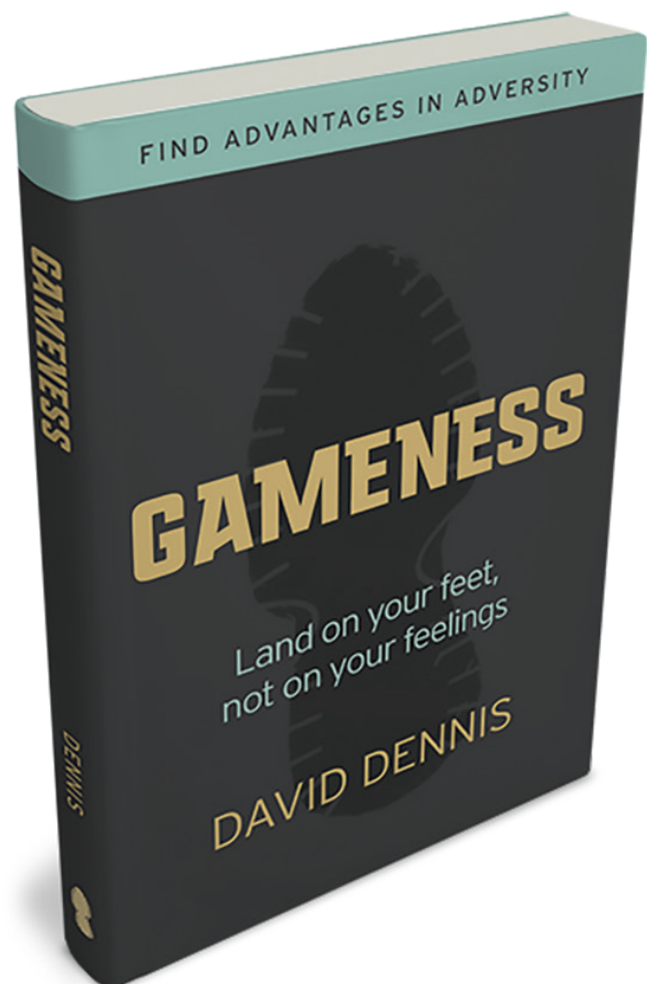
How can leaders apply the principles of Gameness to their own lives and their jobs?

The question to be asked is not "how can leaders apply the principles of Gameness to their own lives and their jobs?" but rather "how can leaders apply themselves to the principles of Gameness in their own lives and their jobs?"

I see Gameness more as practices versus principles. Gameness is an action mindset versus a knowledge mindset. I learned years ago to

"hire character and teach skills." The attributes of Gameness are attributes of character that can only be acquired through disciplined action and strenuous work. But, as William James said, "The strenuous life tastes better."

Our society has focused for too long on resumes and not enough on resolve. College degrees, technical competency, product knowledge, ability to leverage technology, networking skills and number of social media followers will never be enough to accomplish our true potential in life or business.



Adversity will test every life and every business and when it does, no amount of financial wealth, MBA, CEO Network, intelligence, entrepreneurial skill, or political favor will be enough to successfully weather those storms. History and our own experience have demonstrated since the beginning of time that monetary, power, status, and privilege are able to fill a person's bank account and ego while still leaving them bankrupt in their soul.

What are some practical tips or exercises that readers can use to develop Gameness individually and as a team?

I believe being an example of living the practices of Gameness is the most important step to take. Once these attributes permeate your thinking, mindset and approach to life, it will yield fruits in your life and business that will be noticed by others, including your family, friends and team members.

While reading and answering the questions individually or as a team, it would be a good idea to begin journaling insights and opportunities where you or your team can advance a Gameness mindset into your life and your business culture.

I think each unique person and team will formulate practical steps for developing Gameness in ways most important and relevant to the unique needs and goals of each person or business and their current circumstances.

Who do you think would benefit most from reading your book?

I can present compelling data that illustrates both the benefits of wellbeing and the costs/risks related to the absence of wellbeing. The challenges are related to awareness and knowledge of specific competencies and practices that deliver wellbeing. Like any personal or business challenge, success depends on accepting the nature of the challenge and developing and executing a specific plan to successfully address the problem.

You discuss reporting to your purpose rather than your emotion. Can you share some thoughts on that?

Feelings (emotions) are bad bosses. They are invaluable and wonderful servants, but they are horrible masters. Feelings are fickle and can change with my mood, the weather, how others treat me, life circumstances, my problems, my past mistakes or poor choices and regrets.

Purpose is a great boss because it provides meaning, clarity of focus, direction, passion, resolve, and momentum for my life. 🍷

"LIFE CAN ONLY BE UNDERSTOOD BACKWARDS, BUT IT MUST BE LIVED FORWARDS." – SØREN KIERKEGAARD

UP YOUR GAME

Sellers and marketing content must provide value



B2B buyers have changed. Are your sellers prepared? With most B2B sales interactions taking place virtually, it's harder to keep (and track) your buyer's attention. Marketing teams should implement an interactive content strategy to arm reps with the materials they need to sell effectively.

68% of B2B buyers prefer not to interact with a sales representative at all.

61% of vendors offer too much material, and over 50% of buyers said material is extraneous.

88% of B2B buyers only purchase when they see a salesperson as a "trusted advisor."

Buyers see more than **5,000** marketing messages per day.

66% of buyers say making a clear ROI case highly influences their purchase decisions, and

Interactive content sees more engagement than static content, with **52.6%** buyers spending an average of 8.5 minutes viewing traditional content items and 13 minutes on interactive content items.

95% of buyers now require financial justification on any significant purchase.

Source: Mediafly.com - The Complete Guide to Engaging the Modern B2B Buyer

B2B SALES FUNNEL

UNAWARE

AWARE

INTEREST

DESIRE

ADOPTION



Customer's due diligence begins

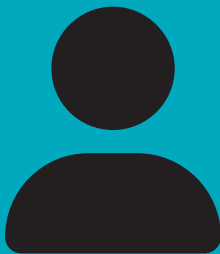
Customer's first contact with supplier

Customer purchase decision

TWO-THIRDS COMPLETE

when first human interaction takes place

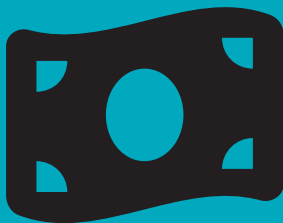
WHY CONTENT WORKS



CUSTOMER
RETENTION



GENERATES
LEADS



COST
EFFECTIVE



BUILDS
TRUST

CONDUIT, INC.

CHANNELING CONTENT AND CONNECTIONS

EXECUTIVE
LEADERSHIP

Leading
PRINT
Summit

ROSEMONT, IL
June 14 & 15

TACTILE
MARKETING

AMPLIFY*
ROADSHOW

KANSAS CITY, MO
September 6

PHILADELPHIA, PA
November 9

SOFTWARE
DEVELOPMENT

print (software)

BOULDER, CO
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