The vision of three organizations coming together to produce an industry-wide event became a reality last month as attendees comprised of 433 graphic communications industry executives, representing 185 companies, with printers outnumbering vendor participants by a 2:1 ratio, solidified the successful debut of the first ever Vision 3 Summit.

The groundbreaking new leadership conference which took place March 13-16, 2011, at the Desert Springs JW Marriott in Palm Desert, CA, was a joint effort co-produced by NPES The Association for Suppliers of Printing, Publishing and Converting Technologies (NPES); the National Association for Printing Leadership (NAPL); and, Printing Industries of America.

Designed for company owners and executives, the two-and-a-half day event offered a distinctly management-level approach to addressing the industry’s biggest challenges with participants stating the information and discussions were “forward thinking innovative” and particularly useful, along with the meeting materials that were available online for follow-up.

Because the Vision 3 Summit was a joint effort of the industry’s top three associations, attendees also benefited from a mix of insights they normally would not receive at other gatherings. “Despite how vast the graphic communications industry is, it really is a small world out there—and seems even smaller when you’re seeing all the same people at the same events every year,” observed NPES President Ralph Nappi. “The Vision 3 Summit is a rare leadership conference that mingles both industry service provider and vendor attendees at the highest levels of management. Participants gain tremendous value and best practices for running their companies from such a mix of expertise, experience and perspectives.”

As the program evaluations revealed, attendees agreed the most valuable aspects of the program were the “great information,” “wide variety of...
True leaders have “the magic.” They recognize the realities, but can simultaneously imagine the possibilities. They understand how to ignite the human spirit through what I’ll call “empowered belief and encouragement” to create an environment where each individual benefits from the collective power of the many—and together all reach new heights of innovation and achievement. Just as in the following example, I have learned that the success of those around me is absolutely predicated on my ability to excite, ignite, and unleash the “Power of the Human Spirit” to create believers who can recognize and achieve the possibilities for themselves.

On August 5th, 2010, the world held its breath when word spread that 33 miners were trapped 2,300 ft. below the surface in the San Jose copper-gold mine in Chile. Shift supervisor Luis Urzúa, recognizing the gravity of the situation and difficulty involved in any rescue attempt, quickly assembled his men to prepare them with a plan for long-term survival. These 33 miners went without any contact from the outside world, and no one knowing if they were dead or alive until the 17th day when a 6 1/2 inch drill pushed through the rock into their space and found them. Reports tell how their emergency supplies were intended for only two to three days, and the miners rationed them making them last for two weeks, running out only just before they were discovered. They consumed “two little spoonfuls of tuna, a sip of milk, a morsel of peach, and a biscuit every 48 hours.” They formed a “one-man one-democracy” team to maintain the mine, look for escape routes, and keep up morale. The reports go on to say they understood that if society broke down they would all be doomed. The men kept hope of survival alive by pulling together to beat hunger, thirst and desperation underground.

“As a group we had to keep faith, keep hope, and all believe that we would survive,” said Urzúa.

On October 13, 2010, after a record 69 days, over an estimated one billion viewers watched on television as the last miner was lifted to safety. I recommend you Google their story and read the facts and statistics behind this amazing and triumphant ending.

The shift supervisor’s efforts to empower the men with constant encouragement and get them to believe in survival after running out of food and water on the 15th day, is a pure example of how much is possible when you excite and ignite the “power of the human spirit” within to succeed! Each of these miners individually, and all as a unified group, believed in the outcome—the mere possibility—that they would be rescued and live. I challenge you to apply your own views and approach to leadership in this situation. Do you lead by title and authority—or take the time to move people beyond reality to achieve their larger-than-life potential?

In November 2010, at the NPES Annual Conference, economist Alan Beaulieu, President of the Institute For Trends Research, delivered a sobering presentation, captivating his audience to the point where hearing a pin drop would have sounded like a shattered glass! His message: “Don’t plan on the economy, government, or an economic bubble to move our industry and businesses forward to profitability and growth.” He made it crystal clear that shear guts, brains, courage and strategic planning with well-executed tactics and new marketing would be our keys to success.

Beaulieu’s message was clear to me: you have to reinvent yourself, your business, and your people to seize tomorrow’s new business opportunities. Just like Luis Urzúa, as leaders we must strive to be the anchor, the compass and the fuel that ignites the “power of the human spirit” in ourselves, our businesses, and most importantly our people.

I know from personal experience that the “shear guts, brains and courage” each of you possesses has been demonstrated in the past, and continues to be tested today. The “game-changer” for the leaders among us will be those who have the “fire in their belly” to convince the world about the possibilities of print!

Dare to dream. Live each day with passion! Go and create believers!
meeting new folks, hearing new ideas and gaining new confidence to continue business practices.”

This was not your standard management conference as the Vision 3 Summit covered an array of topics, delivered in various formats to ensure that participants would come away from every session having learned something applicable to their own businesses. As such, it included sessions in a variety of formats with subject-matter experts, panel discussions covering real-life business examples, inspiring keynote addresses and more. The result was a conference that was practical and visionary which presented, as one participant stated, “real business ideas for business people.”

The Vision 3 Summit replaced NAPL’s, NPES’ and Printing Industries of America’s individual leadership programs, including NAPL’s Top Management Conference; NPES’ Industry Summit that included the PRINT OUTLOOK Conference and PRIMIR Spring Meeting; and, Printing Industries of America’s Presidents Conference. Both NAPL and NPES additionally held their individual board of directors meetings in conjunction with this conference. Additionally PRIMIR held its Spring Meeting in conjunction with the Vision 3 Summit.

While the first co-produced conference by NAPL, NPES and Printing Industries of America, the Vision 3 Summit is not the first joint venture between the three organizations. NAPL, NPES and Printing Industries of America also co-own the Graphic Arts Show Company (GASC), which produces the popular industry GRAPH EXPO and PRINT exhibitions.

Based on the enthusiastic and positive feedback gleaned from this year’s conference, attendees have already indicated their interest in next year’s Vision 3 Summit to be held February 19-22, 2012, at the Marco Island Marriott, Marco Island, Florida.

For more information about the Vision 3 Summit visit: www.vision3summit.org and follow the Vision 3 Summit community online at: Facebook.com/Vision3Summit; twitter.com/Vision3Summit; and Youtube.com/Vision3Summit.

...networking among the three groups was the best thing.”
Vision 3 Summit attendees from among NPES, NAPL and Printing Industries of America mixed and mingled in friendly camaraderie at the Opening Reception.

Keynoter Dr. Lowell Catlett, New Mexico State University professor gets the program off to a start with his informational, entertaining and informative insights about the future, which he states based on today’s technological shift has created “the most complex, differentiated, and segmented market ever.”

NPES Chairman D.J. Burgess opened the General Session on Day 2 to a hearty round of applause from the 443 printers and suppliers in attendance whom he thanked for their support of the groundbreaking new top leadership event.

Doug Barr, Vice President-Sales and Marketing, ECRM Imaging Systems (c), enjoys along with fellow Vision 3 Summit attendees, the informational (and animated) presentation on the economy by keynoter Dr. Lowell Catlett.

NAPL’s Chairman Keith Kemp and President & CEO Joe Truncale offered a warm welcome to attendees and guests from NAPL, NPES and Printing Industries of America at the Vision 3 Summit Opening Reception.

Presenter John Wright, former printing company owner and leadership trainer, demonstrated with ‘live models’ from the audience the leadership decision-making process as he challenged Vision 3 Summit attendees to “think differently” because “people who ARE crazy enough to think they can change the world are the ones who DO.”
Darren Loken, President, Telepress, Inc., joined many attendees who gained the information, follow-up advice, and answers to their specific questions in the ‘open mic’ sessions that concluded each presentation.

Following the presentation by ITR principal Alan Beaulieu (r)—the always-popular and eerily accurate economist—a line quickly formed to the left as attendees eagerly awaited their turn for individual Q & A.

Andy Paparozi, NAPL Senior Vice President & Chief Economist, compares and contrasts perspectives on the economy by previous days’ keynotes Dr. Catlett and Alan Beaulieu, and closes the program with actionable advice for the future.

The mixed-format program included an interactive discussion among CMO panelists who recommended to printers: make your marketing investments in database and analytical capabilities because they will... “drive all print business in the future.”

Michael Makin, President & CEO, Printing Industries of America, welcomed attendees and guests to the Vision 3 Summit Closing Dinner—the perfect ending to another productive day of education and networking.

As attendees gathered together for the Closing Dinner and exchanged insights from the productive and successful Vision 3 Summit, they shared plans to attend next year’s event, Feb. 19-22, 2012, in Marco Island, FL.
NPES Government Affairs Committee Chairman Ulrik Nygaard, President, Baumfolder Corporation, will lead NPES public policy advocacy on Capitol Hill during the Capitol Hill Fly-In in Washington, D.C. June 14-15. Committee activities are open to all Association members, who are welcomed and encouraged to participate.

The NPES Government Affairs Program represents the interests of Association members in the public policy arena by identifying legislative, regulatory and judicial issues of importance, and then developing and advocating policy positions that support the interests of the Association membership and the graphic communications industry in general. The process is guided by the Government Affairs Committee in cooperation with the Government Affairs Director, and is overseen by the Association’s Board of Directors. Typically, Government Affairs meetings consist of briefings on Association public policy priorities and meetings with members of congress, administration officials and their staffs. According to Committee Chairman Ulrik Nygaard, “NPES Government Affairs meetings in Washington, DC are excellent opportunities to meet with government officials and explain the industry’s views on a wide range of public policy issues that have a direct bearing on NPES members’ business interests.”

Conversely, NPES Government Affairs Director Mark Nuzzaco stresses that “having Association members carry the industry message to Capitol Hill as constituents of legislators is an invaluable part of effective advocacy for the Association and the industry.”

And NPES President Ralph Nappi emphasizes the importance of this June’s meeting, which comes at a critical point during the 112th Congress which includes dozens of new senators and representatives who have not yet heard NPES’s message in behalf of its members and the graphic communications industry. “The first six months of any congress is a critical time for setting agendas and establishing priorities, and this is especially true in the case of the 112th Congress” says Nappi.

In that regard, NPES’s current top government affairs priorities that it will be advocating include:

- A Vital and Sustainable U.S. Postal System;
- Affordable and Equitable Health Care Reform;
- Favorable Capital Investment Tax Policy;
- Free, Fair International Trade;
- Affordable American Energy;
- Responsible Environmental Policy;
- Respect for the Value and Integrity of Intellectual Property, and
- Limited, Effective and Efficient Regulations

Information about these priorities can be found on the NPES web site at: www.npes.org/government/priorities.html.

To register for the June 14-15, 2011 NPES Government Affairs Capitol Hill Fly-In visit: www.npes.org/government/advocacy-registration.html, or for more information contact NPES Government Affairs Director Mark J. Nuzzaco at phone: 703/264-7235 or e-mail: mnuzzaco@npes.org.
NPES and its Coalition for a Twenty-first Century Postal Service (21C) mailing industry allies testified before the House Subcommittee on Federal Workforce, U.S. Postal Service and Labor Policy chaired by freshman Congressman Dennis Ross (R-12-FL) during hearings held by his panel on March 2. This was the first hearing in the House of Representatives of the 112th Congress on the precarious financial situation, both short and long-term, of the United States Postal Service (Postal Service or USPS). Other witnesses were new Postmaster General Patrick R. Donahoe, Postal Regulatory Commission Chair Ruth Goldway, and Fredric Rolando, President of the National Association of Letter Carriers.

Represented by spokesman Arthur Sackler, 21C stated that the Postal Service “remains an indispensable medium of commerce and communications in the 21st Century and is the last link of a chain of distribution for a nearly $1 trillion industry that employs more than 7.5 million people.”

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In addition, 21C advocated a number of structural changes to the Postal Service’s business model needed for its long-term viability. One of those changes is a more economically realistic and sustainable USPS workforce compensation and benefits package going forward.

In that regard, not long after the hearing the Postal Service and the APWU (American Postal Workers Union) announced a tentative labor agreement that will be effective upon ratification by the 205,000 APWU members, which is expected to take place by May.

The four-and-a-half-year contract, which would run through May 2015, would give the Postal Service some new cost savings and increased flexibility to its operations by setting lower salary levels for new workers, and a new category of non-career employees. But the agreement also provides a 3.5 percent pay increase over the life of the contract in addition to cost of living pay hikes, and retains protection against layoffs for career employees on the payroll as of November 20, 2010, the latter provision being deemed the most important part of the new agreement according to APWU President Cliff Guffey. However, these latter provisions are also economically very problematic given the continued sharp decline in mail volume, and the Postal Service’s ongoing budget deficits.

The APWU agreement comes after negotiations with the National Rural Letter Carriers Association reached an impasse, and before contract talks with the National Association of Letter Carriers and the National Postal Mail Handlers Union, which will begin soon. As of this time 21C has taken no position on the specific content of these collective bargaining agreements.

For more information contact NPES Government Affairs Director Mark J. Nuzzaco at phone: 703/264-7235 or e-mail: mnuzzaco@npes.org.
The Graphic Arts Education and Research Foundation (GAERF) has announced the launch of **graphicCOMMcentral.org**, an innovative website that provides a direct connection to an extensive network of resources and information for and about today’s graphic communications industry.

“Ours is a fast-paced and highly competitive industry operating in a state of flux, presenting daunting challenges for those interested in keeping abreast of the many changes occurring with light-speed movement. The graphicCOMMcentral.org website provides a unique portal for industry professionals, educators, students, and all those interested in the graphic communications industry to stay informed,” advises Raymond J. Prince, NAPL Vice President-Technical Consulting Group, the individual responsible for spearheading the project.

The website is divided into eight distinct sections chaired by industry professionals who will ensure that graphicCOMMcentral.org offers rich content. Visitors will also discover direct access to the latest industry information and trends, a free job board, interactive social networking, and streaming media.

Section chairmen include:
- Ronnie H. Davis, Ph.D., Vice President and Chief Economist, Printing Industries of America
- Paul Foster, Vice President, Printing & Graphics Association MidAtlantic
- Gary A. Jones, Assistant Vice President, Environmental Health and Safety Affairs, Printing Industries of America
- James Kyger, Assistant Vice President of Human Resources, Printing Industries of America
- Andy Plata, CEO, OutputLinks, MPSConnect, and Graphic Communications World
- Jerry J. Waite, Professor, University of Houston
- Larry Warter, CEO, Warter Colors, and
- Daniel G. Wilson, Professor, Illinois State University.

“This website serves as a portal to cutting-edge information about industry markets and trends, technology updates, education and career opportunities, breaking industry news, and more,” said GAERF President Ralph Nappi. “Online visitors will experience a vibrant, continuously updated, and comprehensive view of the graphic communications industry, making return visits to graphicCOMMcentral.org always interesting and informative.”

“The redesigned graphicCOMMcentral.org website creates a new home in cyberspace for a wide range of resources specific to the graphic communications industry,” comments Eileen Cassidy, GAERF Director. “With a totally fresh appearance and format, this web portal provides ‘one-stop shopping’ for a broad audience.”

To submit relevant industry information to graphicCOMMcentral.org contact GAERF at e-mail: gaerf@npes.org or phone: 866/381-9839.
J oin NPES’ trade mission to Mexico in conjunction with the Expográfica show in Mexico City, May 17-20, 2011. Let us help you reach new customers, increase your sales and create brand awareness in Mexico!

As a neighboring country of the U.S. and member of NAFTA, Mexico is a natural market for U.S. exporters. Covering almost 1.2 million square miles, Mexico is one of the largest countries in Latin America with about 110 million people. Proximity and access to North American markets and technology have positioned Mexico as one of the most attractive economies for foreign direct investments in Latin America. With a history of diverse economic developments, strategic access to trade routes in the Atlantic and Pacific oceans, geopolitical connections with the United States and other Latin American countries, Mexico has always, and will continue to be a key economy for global trade.

After rapid economic, social and technological growth beginning in the 1990s, today Mexico is one of the world’s largest economies and one of the fastest growing economies in the world, with a stable growth rate of 7.6%. As a regional power, and since 1994—when it became the first Latin American member of the Organization for Economic Co-operation and Development (OECD)—Mexico was firmly established as an upper middle-income country. In fact, in 2009 Mexico surpassed the World Bank’s high income economic threshold to become a “high income” country. Mexico is considered a newly industrialized country and an emerging power. It has the 13th largest nominal GDP and the 11th largest by purchasing power parity. The economy is strongly linked to those of its North American Free Trade Agreement (NAFTA) partners, especially the United States. Mexico’s size and diversity are often under-appreciated by U.S. exporters. Trade liberalization, a strong domestic market and low labor costs have also contributed to Mexico’s trade boom.

For more information about this important business development opportunity, contact Pernilla Jonsson, NPES Assistant Director-International Trade at phone: 703/264-7200 or e-mail: pjonsson@npes.org.

Quinlan to Receive NYU Prism Award at 25th Anniversary Recognition Luncheon

O n June 21, 2011, at the NYU Prism Award Luncheon to be held in New York City’s historic Gotham Hall, Thomas J. Quinlan, III, president & CEO, RR Donnelley, will be honored as the recipient of the 2011 NYU Prism Award, when the event marks the 25th Anniversary of this prestigious award.

Sponsored by the Master of Arts in Graphic Communications Management and Technology program at the NYU School of Continuing and Professional Studies, the NYU Prism Award is presented annually to recognize distinguished leadership in the graphic communications media industry.

Previous NYU Prism Award recipients include: Vyomesh (VJ) Joshi, executive vice president, HP’s Imaging and Printing Group; Cathleen Black, chairman of Hearst Magazines and newly named Chancellor of New York City School System; Antonio M. Perez, president and CEO of Eastman Kodak Company; Anne M. Mulcahy, chairman of Xerox Corporation; Janet L. Robinson, president of The New York Times and past CEOs of R.R. Donnelley & Sons Company, Sun Chemical Corporation and The Washington Post.

Net proceeds from the Prism Award Luncheon help fund student scholarships as well as provide student and program support for the internationally renowned NYU-SCPS Graphic Communications Management and Technology graduate program, which prepares the next generation of industry leaders.

For more information about the Prism Award Luncheon, or to purchase tickets to the event, contact Carmela Hache at phone: 212/998-6956, e-mail: carmela.hache@nyu.edu, or visit: www.scps.nyu.edu/prism.
PRIMIR recently published a new 420-page research study, “Trends & Future of Direct Marketing.” It examines direct marketing and particularly how printed direct marketing channels are faring in light of a host of new non-print direct marketing options. E-mail, websites, social media, and mobile channels, among others, all pose threats to print.

Picking up where we left off in the previous edition’s that discussed key trends in direct marketing, this article will discuss higher volume print applications utilized in direct marketing activities.

Direct Mail

Direct mail is the largest direct marketing channel in North America. Although the decline has been precipitous, direct mail’s standing in the marketing mix remains strong. Direct mail volume stabilized in 2010 and will return to positive and more modest growth, although it will be years before it reaches its prior peak.

Direct mail is a key customer acquisition tool. That said, the availability of an increasing number and variety of electronic channels has placed the cost of direct mail in an increasingly unfavorable light in the minds of many marketers. In addition to directly affecting direct mail costs, postal rates and regulations add a layer of complexity to the process, again highlighting the relative speed, simplicity, and low cost of electronic channels (see Figure 1).

Catalogs

Marketers to both consumers and businesses make use of catalogs. The research indicates that despite rising postal costs and other issues catalogers face, the catalog market is healthier than one might expect. During the past decade, the role of the catalog changed substantially, from a direct response vehicle to one that drives customers to the web to place an order. This change impacted the volume and nature of printed catalogs. But on the positive side, it secured their place as an essential part of an integrated, multi-channel marketing program.

Despite the positive outlook revealed in the research study, numerous trends will have a significant impact on catalogers and their service providers. These include: changes in catalog size, circulation, and frequency; personalization and versioning; postal costs; competition and integration with other direct marketing channels; and, implications for print suppliers.

Flyers and Inserts

Preprints and Free Standing Inserts (FSIs) are typically distributed through newspapers; many are also delivered directly to the home through mail or hand delivery. FSIs are proven as an extremely cost-effective means of allowing retailers to reach their targeted customer.

The FSI market is robust and one of the few bright spots for newspapers. The continued health of this category has confounded those who predicted its demise along with falling newspaper circulation. Kantar Media indicated that FSI spending increased by 7.6% in the first half of 2010.

The research found that...
The chart compiled from UCC data provided herein by Equipment Data Associates (EDA), shows up-to-date UCC (see definition below chart) activity for all printing equipment. Although UCC filings are a combination of new equipment sales, used equipment sales and refinancings of existing placements, they are still a strong indicator of market activity. New equipment filings for January returned to the bearish pattern of 2008 and 2009 falling by 40% from December 2010 levels and 9.5% down on a year over year basis. Used equipment filings stayed relatively stable but at historically low levels. This information is extracted directly from EDA’s comprehensive database of nearly 30,000 records for purchasers of printing equipment.

For each of the data points in the table, subscribers to EDA’s market intelligence services can see exactly who purchased the piece of equipment—and the manufacturer and model. NPES member companies that participate in the free NPES Market Data program are eligible for significant discounts on EDA’s services. By combining the critical purchaser information from EDA with the comprehensive market statistics, analysis, and forecasts provided by NPES’ free Market Data program, participating NPES member companies can get a complete picture of the current and anticipated future activity in the marketplace.

For more information, or to join the free NPES Market Data program, contact NPES Assistant Director for Market Data, Rekha Ratnam at phone: 703/264-7200 or e-mail rratnam@npes.org. For specific information about the market intelligence services offered by EDA, contact Mauricio Jurin at phone: 704/845-1099 or e-mail: mjurin@edadata.com.

Printing Equipment UCC Filings: 2006—2011
GAERF Announces 2011 Student Design Competition

The Graphic Arts Education and Research Foundation (GAERF) has announced the launch of the GAERF 2011 Student Design Competition.

This third annual contest will challenge entrants to design marketing materials to promote graphicCOMMCentral.org, a comprehensive website providing a direct connection to an extensive network of resources and information for and about today’s graphic communications industry.

The GAERF 2011 Student Design Competition invites students to be creative by taking their original design from concept to finished product as they review the contents of the eight main sections of graphicCOMMCentral.org: DISCOVER, DECIDE, LEARN, EMPLOY, INVESTIGATE, MEET, INFORM, and PRINT GREEN, choose one section to promote, and design two marketing pieces to drive traffic to that section of the website.

The competition is open to all students attending secondary or post-secondary institutions in the continental United States who are studying in a graphic communications/printing, advertising, graphic design or interactive media program. Entries selected by GAERF will be judged by industry professionals who maintain the graphicCOMMCentral.org website.

First place winners and their instructors will receive two-day all-expenses paid trips to attend GRAPH EXPO in Chicago, IL. In addition, the students will receive $2,000 awards presented during GRAPH EXPO 2011’s Career Awareness Day on September 14, 2011. Second place winners will receive $1,500, and the third place winners will receive $1,000.

“GAERF is proud to continue its commitment to supporting education initiatives by encouraging creativity and self-expression in students through the art of design and production,” said GAERF President Ralph Nappi. “This competition will serve to recognize our best and brightest students, as well as the significant commitment of their instructors.”

For complete information about the GAERF 2011 Student Design Competition visit: www.gaerf.org.