

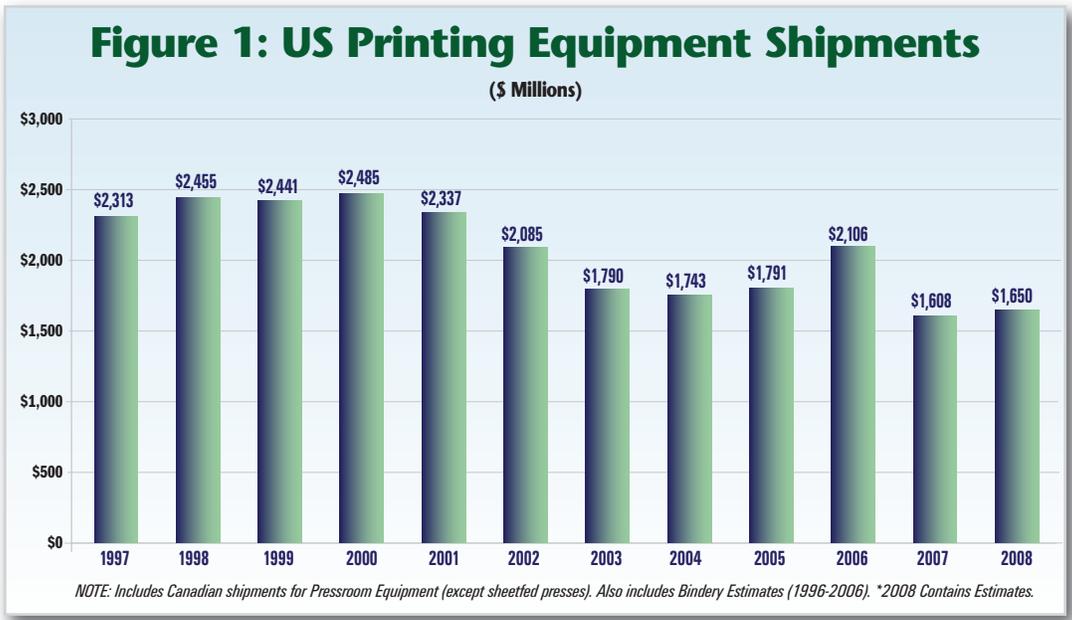


news

THE ASSOCIATION FOR SUPPLIERS OF PRINTING, PUBLISHING AND CONVERTING TECHNOLOGIES

Preliminary 1st Quarter 2008 Surprisingly Strong

First quarter equipment shipments came in up 3.7% compared to the same quarter 2007, which given the state of the U.S. economy is an especially strong win for NPES members. NPES equipment data includes prepress, press and post-press equipment but there is no digital press data included in the report. The NPES program collects U.S. shipments of equipment and supply products. Coupled with the fact that the U.S. dollar is extremely weak, we suspect that members are also experiencing strong export sales, which are not reflected in



INSIDE:

- Chairman's Perspective** 2
- New RIT Research on Web-Enabled Print Architectures** 3
- Everything You Want to Know NOW - Just a Click Away** 3
- Go East Young Man!** 4
- NPES 75 Years Later: A Legacy of Leadership** 5
- NPES Champions Career Potential in Industry** 5
- SkillsUSA 2008: Contest Wrap** 6
- Leader's Guide To Success** 7
- News and Notes** 8

the reported data. On the supplies side, the first quarter totaled \$282 million which was up 1.1% over the same quarter 2007. The supply products reported include graphic arts film, printing plates (lithographic), proofing products and the related chemistry.

All in all, considering the tough print market we are facing, this is an excellent start for 2008.

Looking forward to the second quarter we have two conflicting scenarios that might affect industry performance. Clearly, we are seeing further weakening in the economic situation as the credit crisis appears to be worsening and has now spread to Fannie Mae, Freddie Mac and even individual banks across the country. How

continued on page 3

NPES WORLD BUSINESS DEVELOPMENT PRESENTS
INDO-AMERICAN PRINT SUMMIT
 A Leadership Forum & Trade Mission

SEPTEMBER 8-10, 2008
 NPES Trade & Development Mission to India
To explore the many potential business relationships available.

SEPTEMBER 11-12, 2008
NEW DELHI: Leadership Forum
To forge new partnerships between American and Indian Companies.

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chairman's perspective

Hank A. Brandtjen, III
NPES Chairman
President, Brandtjen & Kluge, Inc.

The Golden Rules of Business

Upon returning home from IPEX' 93, my



girlfriend at the time surprised me with a Golden Retriever puppy. Convinced that I didn't have room in my life for a dog, I named her "History," because she

certainly needed to be returned! Then, tired from jet lag, the puppy and I proceeded to fall asleep together on the couch. The very next day, I named her Mica. Over the years she taught me a lot about life and business. Foremost, Mica taught me about unconditional love. She taught me that each day is a new day, and that no matter what my mood or how long I had been away, she'd be glad to see me. Mica treated me with kindness which I, in turn, reciprocated.

Kindness Begets Kindness

One day while traveling on business, my flight was canceled resulting in a long layover. As I waited with the other passengers to learn our fate, the man in front of me decided that the woman at the Help Desk was to blame for our dilemma. After he finished with his tirade and stomped off, I moved up to the counter and simply stated that I had overheard my options and handed her my ticket for re-routing. I walked away with a first class upgrade, a pass to the lounge, and a voucher for a meal—the one the man in front of me did *not* get. Kindness begets kindness.

Stretch

Mica also taught me to make time for exercise and the importance of stretching. Every time Mica got up, she would arch her back and stretch. No matter the weather, it was always nice enough to go for a walk or a run—rain or snow be damned! (I hate to say it, but dogs are a lot

smarter than people.) Exercise and remaining limber are excellent ways to relieve the pressures of business. Just getting out for a bit of fresh air is enough to make any day feel better. So before making any important business decision, I recommend that you go for a walk, eliminate the distractions and think through your options and consequences.

Go With Your Gut

A recent print magazine had a profile of Janet Steiner, president of Thoro-Packaging. When asked what she liked least about her job she said terminating an employee. I agree with her. I think hiring an employee is a complicated process. No matter what questions are asked, there's always an element of "fit." While Golden Retrievers are people-friendly, I never underestimated Mica's ability to size people up. Maybe I should've introduced every job applicant to my dog? I have no doubt that she could have avoided some of the mistakes I made. The lesson here is to go with your gut. If something doesn't feel right, it is *not* right for you, so move on.

Friendship

Never take friendship for granted. No matter how long the absence, Mica is glad to meet an old friend. At this past Drupa show I took the time to meet with David Wright of Martin Automatic. When I first became involved with NPES, David was there to help me understand all that being active in NPES could do for me. In the process, I gained a friend and colleague who I could call whenever I came across a business situation that needed a sounding board against whom I could bounce ideas off. David is retiring soon and I will miss him at industry events. I have no doubt, though, that we will remain in touch.

Last fall Mica passed away. Not a day goes by that I don't miss her. As her muzzle grayed and she slowed down a bit, she stayed true to herself and the lessons she lived her life by. My goal is to live up to *her* standards. The other day I passed a car with a bumper sticker that read "Please Let Me Be The Person My Dog Thinks I Am." Enough said. ●

New RIT Research on Web-Enabled Print Architectures

Since 2001, NPES has been a founding member of the Printing Industry Center at the Rochester Institute of Technology (RIT). The Printing Industry Center is dedicated to studying the major business environment influences in the printing industry brought on by new technologies and societal changes. The Center accomplishes this through a combination of research and educational outreach.

Recently, the Center published a study entitled "**Web-Enabled Print Architectures**", which analyzes the current state of Web-enabled print within the printing industry. It reports that print manufacturing operations today are divided into two categories: those that are Web-enabled and those that are not, defining non-Web-enabled print as hardcopy originals or digital files provided on a CD-Rom or a flash memory drive. Web-enabled print is defined as a printed product generated using the Internet at any point within the production process; Web-enabled can be further broken down to partially or completely Web-enabled.

Although Web-enabled automated print production workflows are increasing within the industry, no clear definitions of these various print architectures exist to help with the decision making for the people that use them. This study provides a system for classifying these Web-enabled print system architectures.

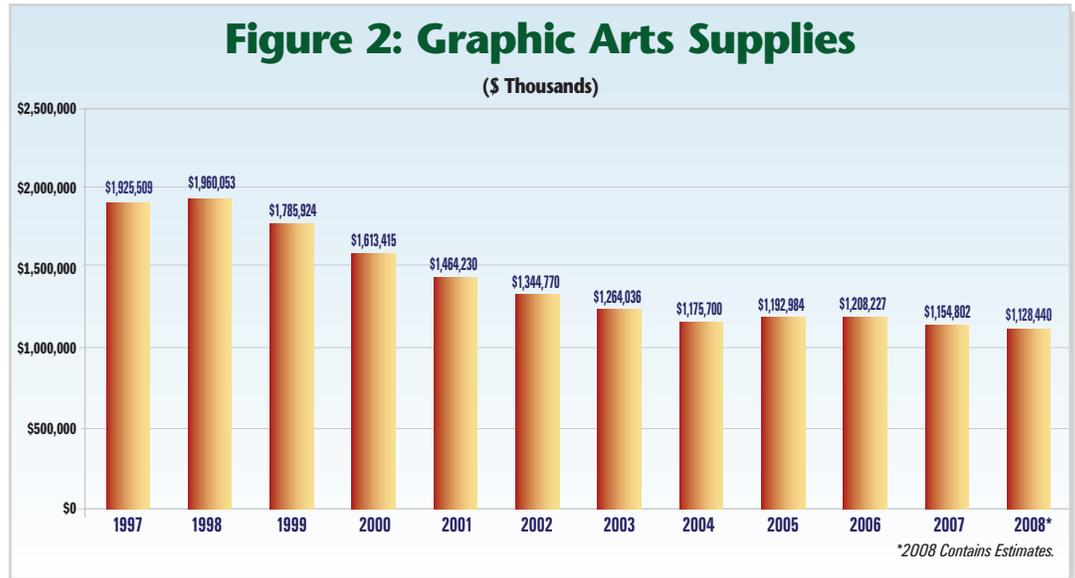
Among the reasons for producing this study is the printing industry undergoing some fundamental transformations, which require service providers to adopt new business strategies and invest in new technology. According to the research, adopting new Web-enabled production models will help meet the changing needs occurring within the industry.

Consumers, professional print buyers, print service providers, equipment vendors and academia can all benefit from these new Web-enabled printing systems that allow for efficient product specification and order submission, which in turn produces high-quality printed products. Consumers and print buyers alike benefit from this outcome. Print service providers will benefit by having technology in place that allows them to introduce new business opportunities and new markets. For equipment vendors, as printers succeed, so do they; they see the opportunity in Web-enabled systems and, therefore, help printers make changes that will enable the use of these systems in their manufacturing. Academia will be the source for the industry, providing graduates who will be knowledgeable in information systems and production processes that support Web-enabled print.

As a Printing Industry Center Industry Partner, NPES has exclusive access to this and all other research monograph publications before they are available to the general public. To receive this monograph, contact Rekha Ratnam at e-mail: rratnam@npes.org. ●

this affects financing of machinery isn't clear but it can't be helping. We know from the news that even individuals with excellent credit are having some difficulty finding mortgage money so we can assume that companies seeking financing are having similar problems.

On the positive side, we had an extremely successful drupa 2008. All reports indicate that sales of all types of products were brisk at the event. My discussions with large NPES members indicate that for the most part, their sales goals from North American customers were met or exceeded. However, in the aggregate, we also know that relatively few North American printers actually attend drupa, so how



drupa affects 2nd quarter performance is not clear. Finally, since drupa ended in mid-June and the NPES program tracks shipments, we probably won't see the true impact of drupa sales until the 3rd quarter 2008.

If we extrapolate the first quarter equipment shipments to the full 12 months, as is illustrated in *Figure 1*, 2008 will come in at \$1.65 billion which is slightly higher than 2007. *Figure 2* shows that the supplies

markets will come in slightly below 2007 levels at \$1.13 billion. In summary, 2008 is off to a relatively good start and we can be cautiously optimistic that the year will be at least comparable to 2007. ●

Everything You Want to Know NOW – Just a Click Away

NPES has a wealth of information—data, statistics, forecasts, research and much more—stockpiled here at headquarters. But that doesn't do you much good at 6:30 p.m. on a Friday when you need a particular data point for the boss who's making a speech on Monday morning—until now. While our staff may not be at your disposal 24-7, you can get immediate access to the answers you need online from NPES' expansive library of resources, just a click away at: www.npes.org.

On NPES' web site, once you log in to the "Members Only" area, a quick click on "Resources" will bring you to a vast library of resources that includes Executive Summaries of recent PRIMIR or NPES research studies. You will also find links to the Sloan Printing Industry Center at RIT research reports, NPES Market Data, Market Scan, EumaPrint and Market Information reports. Soon, the Resources section of NPES' website will also be enhanced to offer case studies, articles, presentations from past meetings and other reports about our industry.



An exciting coming attraction! Soon you will be able to access Individual Country Reports for the 51 global countries represented in the PRIMIR/NPES "World Wide Market for Print" studies. Each of the reports, which are about 15 pages in length, provide a thorough profile of the economic situation, demographic statistics, media trends, internet usage, and statistics specific to the printing processes and applications. Each report also includes statistics about machinery, consumables, inks, and substrates sales for that country.

So, the next time you need quick, specific information on a particular topic, come to the source—www.npes.org. And do visit often since new content is added weekly! ●

SAVE THE DATES!

NPES Annual Conference

"Print Reinvented: The Next 75 Years"

November 15-17, 2008

**Don CeSar Beach Resort
St. Pete Beach, Florida**

A dynamic and content-rich agenda is shaping up designed to engage members in direct exchange with industry thought-leaders and peers.

**MARK YOUR
CALENDAR NOW AND
PLAN TO ATTEND!**

Go East Young Man!

“Go West, young man,” served as the mantra for the nineteenth century American migration. The gold rush of 1849 was the impetus for much of the migration of Americans and immigrants to California and the West Coast. Indiana newspaper writer John Soule's 1851 advice would be popularized by Horace Greeley, and the trend of westward expansion accelerated from the Appalachian Mountains in the eighteenth century across the country to California. United States citizens as well as immigrants would migrate all the way to the Pacific Ocean by the mid-nineteenth century seeking a better life. From *why* people decided to move to *how* they would transform the places that they settled, western movement was a landmark phenomenon in American history.

From a business perspective, the West has been the “gold mine” for NPES members for decades as the North American Market, Western Europe and Japan have constituted over 76% of the worldwide market for print. Today, the U.S. is still the largest print market by far at over \$182 billion. Japan is still #2 with Germany and other European markets still in the top ten. From a regional perspective, North America and Western Europe constitute 62% of the worldwide market, so it is clear that they are still important and deserve serious attention by all NPES members.

Much attention in the business press and here at NPES has focused on the BRIC countries (Brazil, Russia, India and China). Clearly, the fastest growing markets over the past decade have been India and China with Brazil and Russia

not far behind. In fact, according to the PRIMIR/NPES “Worldwide Market for Print” study, China now ranks as the #3 market in the world and India is #12 and forecasted to grow to #8 by 2011.

NPES has a presence in all of these markets and we just passed our 10-year Anniversary of the NPES China office. So in some respects, we've been ahead of the curve in seeking out new markets for our members' products. Although these markets are still considered to be “developing,” in many respects they are “developed”... especially when compared to other emerging markets. According to a recent article by Harold Meyerson in the *Washington Post*, “Doing business in China is beginning to cost real money. Not that Chinese workers are buying second homes or anything like that: Their average wage is still a little short of a dollar an hour. But so many Chinese have now left their villages for the factories that the once bottomless pool of new young workers is beginning to run dry, and the wages of assembly-line employees are rising 10 percent a year.” So, where are manufacturers going to find the lowest cost wages today? Meyerson says that many are fleeing south of the border—not *our* border (Mexico costs way too much.) but China's. They're bound for Vietnam.

So this begs the question, where do we go now? Clearly, NPES needs a presence in the BRIC markets, but to what extent and where are the *new* BRIC countries to come from?

The mantra going forward is “Go East Young Man!”, meaning Eastern Europe (beyond

Russia), the Middle East (especially the gulf states) and Southeast Asia. Unfortunately it

doesn't form a clever acronym, to coin a term we could call it EEMSEA (pronounced EMC).

continued on page 5

Global Printing Markets, 2001-2006 (US\$ Million)

Country	2001	2005	2006p	% change 2005-2006p	CAGR (%) 2001-2006p
United States	\$159,738.70	\$177,008.10	\$182,000.70	2.8	2.6
Japan	76,617.60	87,909.30	84,451.10	-3.9	2
China	19,886.80	35,202.20	40,800.70	15.9	15.5
Germany	26,895.50	38,224.90	37,077.90	-3	6.6
UK	23,651.60	33,599.50	33,283.10	-0.9	7.1
France	14,780.30	22,594.60	22,222.80	-1.6	8.5
Italy	14,502.00	22,515.50	22,074.50	-2	8.8
Canada	9,232.70	14,462.00	15,825.30	9.4	11.4
Brazil	6,638.60	10,592.20	13,482.20	27.3	15.2
Spain	8,264.90	13,308.10	13,243.00	-0.5	9.9
Mexico	6,894.40	11,467.60	12,742.90	11.1	13.1
India	7,020.10	11,254.60	12,215.00	8.5	11.7
Australia	6,109.20	8,902.90	8,620.20	-3.2	7.1
Netherlands	5,452.20	8,003.40	7,911.40	-1.1	7.7
South Korea	3,995.60	6,196.70	6,869.50	10.9	11.4
Sweden	4,123.70	5,993.60	5,808.70	-3.1	7.1
Belgium	4,028.80	5,859.70	5,702.20	-2.7	7.2
Indonesia	3,388.70	4,850.70	5,523.80	13.9	10.3
Hong Kong	4,806.40	5,082.50	5,146.40	1.3	1.4
Austria	3,525.90	4,985.70	4,905.90	-1.6	6.8
Norway	2,981.80	4,147.70	4,276.20	3.1	7.5
Russia	1,227.10	3,497.00	4,076.30	16.6	27.1
Switzerland	3,011.80	4,066.90	3,893.30	-4.3	5.3
Denmark	2,676.40	3,818.30	3,795.30	-0.6	7.2
Malaysia	1,928.30	3,194.40	3,438.70	7.6	12.3
Poland	1,570.30	2,655.00	2,916.50	9.8	13.2
Argentina	4,753.20	2,338.10	2,721.80	16.4	-10.6
Greece	1,727.80	2,723.30	2,720.30	-0.1	9.5
Finland	1,818.90	2,663.50	2,635.30	-1.1	7.7
Taiwan	1,926.20	2,530.70	2,510.10	-0.8	5.4
Ireland	1,403.40	2,321.90	2,342.50	0.9	10.8
Turkey	1,001.80	2,072.60	2,301.80	11.1	18.1
Portugal	1,482.50	2,282.00	2,264.50	-0.8	8.8
Singapore	1,572.90	1,940.10	2,088.90	7.7	5.8
South Africa	1,326.20	1,817.60	1,836.80	1.1	6.7
Philippines	1,241.10	1,427.00	1,614.10	13.1	5.4
Czech Republic	709.1	1,520.80	1,584.80	4.2	17.4
Chile	1,029.80	1,405.90	1,412.50	0.5	6.5
New Zealand	739.90	1,257.50	1,198.10	-4.7	10.1
Hungary	387.50	898.20	906.40	0.9	18.5
Venezuela	816.20	787.50	876.60	11.3	1.4
Colombia	471.00	666.60	709.90	6.5	8.5
Romania	228.40	606.20	694.50	14.6	24.9
Thailand	350.50	488.70	562.10	15	9.9
Ukraine	188.60	432.30	523.40	21.1	22.6
Slovenia	225.30	453.80	474.60	4.6	16.1
Peru	319.10	428.30	444.70	3.8	6.9
Saudi Arabia	197.30	308.70	352.90	14.3	12.3
Bulgaria	82.40	169.40	175.70	3.7	16.4
Israel	145.60	153.40	153.70	0.3	1.1
Vietnam	102.90	146.20	150.50	3	7.9
Total above	447196.80	581233.50	595559.60	2.5	5.9
Others	3,691.70	4,594.30	5,032.00	9.5	6.4
World	\$450,888.60	\$585,827.70	\$600,591.80	2.5	5.9

Note: p=projected; CAGR=Compound Annual Growth Rate

Source: Pira International Ltd

Go East continued from page 4

Let's take a look at some of the countries that might be a target for NPES members' attention going forward.

South Korea

The largest of the Asian markets yet untapped by NPES is South Korea. Although technically it isn't in South East Asia, it's a sizable market with much potential for NPES members. At #19 and over \$6.8 billion in print sales, it's the largest emerging market in the Asian region. The compound annual growth rate of this market from 2001 to 2006 was 11.4% making it both large and fast growing.

Indonesia

As has been covered in previous *NPES News* articles, Indonesia is the 4th most populous country in the world and the 22nd largest print market in the world. At slightly under \$6 billion in print shipments in 2006, it's both a fast growing and sizable market.

Hong Kong

Checking in at #23 on the hit parade is Hong Kong. With a print market just slightly above \$5 billion it is also a good sized market with much growth potential.

Malaysia

At \$3.4 billion in print sales, #29 Malaysia grew at a CAGR of over 12% over the period 2001-2006 making it a worthy target.

Other interesting markets in the Southeast Asian region include Taiwan (#34), Philippines (#40) and Thailand (#48).

Moving west to Eastern Europe we have a number of potential markets that NPES members should keep in mind.

Poland

Checking in at #30 we have our first target in the Eastern European arena. Poland's print market was just under \$3 billion

continued on page 6

NPES 75 Years Later

A LEGACY OF LEADERSHIP

This year, NPES The Association for Suppliers of Printing, Publishing and Converting Technologies celebrates 75 years of service to member manufacturers, importers and distributors who provide the equipment, supplies, systems and software used in every printing, publishing and converting process from design to distribution.

Throughout 2008, in every issue of NPES News look for some of the featured highlights from our association's distinguished 75-year history.

Since its inception, NPES has set the pace for our industry based on a foundation of strong leadership provided by members such as those who served on NPEA's (NPES') 1953 Board of Directors.



L to R: Front row, Richard B. Tullis, Miller Printing Machinery; Fred S. Tipson, T.W. & C.B. Sheridan Co.; J. Wesley Lee, The Challenge Machinery Company; Howell G. Evans, Hamilton Manufacturing Company; James E. Bennet, Babcock Printing Press Manufacturing Company; NPEA Secretary. Second row, Philip P. Merrill, Ludlow Typograph; Edward G. Williams, ATF; Donald C. Cottrell, The Cottrell Company; Harold T. Simpson, The Printing Machinery Company. Standing, Martin Reed, Mergenthaler Linotype; Harry G. Willnus, Intertype; R. Verne Mitchell, Harris Seybold Co.; James W. Coultrap, Miehle.

NPES Champions Career Potential in Graphic Communications Industry

In response to growing concern about the shortage of trained manpower, NPES is leading the effort to insure that career opportunities in the U. S. graphic communications industry are accurately reflected in the Federal Government's official job classification framework known as the Standard Occupational Classification (SOC), which was published in 2000 and is now being revised for republication in 2010. This initiative is one of several stemming from a meeting of industry leaders at GRAPH EXPO® 2007 that has come to be known as the "Education Summit," which focused on ways that various constituencies could be brought together to develop a cohesive message for youth, the public and educational leaders about the manpower needs and career potential in the graphic communications industry.

The SOC is designed to reflect the current occupational structure of the United States, and provides data widely used by government program managers, industrial and labor relations practitioners, employers and job seekers, academic and business researchers, educators, guidance counselors and students exploring potential careers and identifying educational and training alternatives. In some cases training programs have not been funded because of erroneous career opportunity information reflected in the SOC. Therefore, it is critical that the SOC accurately portray

the true nature of the rapidly changing graphic communications industry, in order to meet the manpower needs of its member companies and avoid debilitating labor shortages.

The SOC revision process is being conducted by the Standard Occupational Classification Policy Committee (SOCPC) under the direction of the Office of Management and Budget (OMB). The SOCPC includes representatives from a number of federal government departments, including the Department of Labor's Bureau of Labor Statistics, which plays a major role in the process.

The 2010 SOC revision began with a Federal Register notice in May 2006 calling for information. The SOCPC received and reviewed hundreds of comments in response to that call, and in a May 22, 2008 Federal Register notice issued its recommendations for revising the 2000 SOC for 2010. The OMB and the SOCPC now seek comment on these recommendations by July 21, 2008. An Education Summit committee lead by NPES Government Affairs Director Mark Nuzzaco is currently reviewing graphic communications industry job titles and descriptions contained in the proposed 2010 SOC to insure that they properly reflect the hi-tech nature of employment in the 21st century graphic communications industry. ●

SkillsUSA 2008

GRAPHIC COMMUNICATIONS CONTEST WRAP

The SkillsUSA Championships is an annual event designed to showcase the top career and technical education students in the nation. Each year, more than 5,000 contestants compete in 91 separate events. This year's SkillsUSA Championship took place June 23-27 in Kansas City, MO. GAERF President Ralph Nappi represented the organization in the SkillsUSA opening ceremonies.

Four of the six graphic communications SkillsUSA winners this year hailed from PrintED-accredited schools. PrintED, administered by GAERF, is a national accreditation and certification program, based on industry standards, for graphic communications courses of study at the secondary and post-secondary levels.

Right: Forty-one SkillsUSA contestants from 32 states assembled to compete, preparing digital workflow files at the Electronic Prepress testing site.



Left: Demonstrating their knowledge and skill, student competitors operate Heidelberg two-color litho presses as they worked to complete their 4-color poster assignment.



Left: Students race against the clock competing on various folding exercises in the Finishing category, one of the seven skill areas in the SkillsUSA Graphic Communications contest.

Go East continued from page 4

in 2006 and the CAGR from 2001 to 2006 was over 13%.

Czech Republic

Continuing the Eastern European theme, we have the #41 print market—the Czech Republic which totaled a little over \$1.5 billion in 2006.

OK...so what about the Middle East? The largest market in the region is Saudi Arabia which grew 14.3% from 2005 to 2006 but was only a \$350 million market. Clearly, it's not in the league of South Korea, Indonesia or Poland for that matter. But, it's clear that with the money and investment going on in the area, significant print growth is on the horizon. Although it's not currently in the top 50 markets, Dubai and the other 6 United Arab Emirates also warrant monitoring. To demonstrate the potential of this region, RIT recently announced the opening of a campus in Dubai, a solid indication of the potential of printing in the region.

As these markets develop, they will demand newspapers, magazines and other print products to support their growing commerce base.

Figure 1 is the top 50 worldwide markets as determined in the PRIMIR study the Worldwide Market for Print. PRIMIR developed Individual Country Reports for each of the top 51 world markets. They are available in print to NPES members for \$15 each. Or they can be downloaded for free from the Members' Only section of www.npes.org. Members interested in a copy of any country market Executive Report should contact Darcy Harris at phone: 703/264-7200 or e-mail: dharris@npes.org. Any member interested in exploring any of the markets discussed in this article should contact Kip Smythe or Mike Hurley at phone: 703/264-7200. ●

Right: Four of the six SkillsUSA 2008 Graphic Communications' medalists hailed from PrintED accredited schools: (front row L to R): High School medalists—Silver-Alyssa Ailion, Walton HS, (GA); Gold-John Litwinowicz, Royal Oak HS, (MD); and, Bronze-Chloe Grace, Autry Technology Center, (OK); (Second row, second from left): Gold-Mayda Salas, Riverside CC, (CA).



The Leader's Guide to Success

By Michael Whitney

Something has changed. You feel it in your bones; see it in your backlog; hear it from your salesmen; and, measure it on your P&L. The business cycle isn't dead after all. What just months ago seemed to be a well-deserved joyride of large orders, motivated customers, and talk of even greater future opportunities for your company has seemed to evaporate for reasons you don't entirely understand.

Now it's clear that this year will not be as good as last year—and who knows about the year after that? How long and how deep will this decline be? Now is the time to get reacquainted with reality and to

enough! No matter what I do this downturn is hurting me, my company, and our employees. Nothing seems to work...

5. *Acceptance* – there will be no quick turnaround – this is going to be a really hard time for a while.

To this list, I've added a sixth stage – *Action*. Getting to acceptance is important, but acceptance is basically a *passive* destination and in challenging times, you and your company can't afford to be passive. Thoughtful action will lift you and your company out of the doldrums during trying times and offer a path to success. Key characteristics of "thoughtful action" are:

successes and strengthen a positive company culture.

As you develop your action plan it's important to remember that each of your constituencies—management, employees, suppliers, ownership and customers—are experiencing trying times in different ways and progressing through the stages of grief at different times.

Your primary leadership challenge is to figure out where you are within these stages and then focus on getting to the acceptance and action stages as quickly as possible. Your second leadership challenge is to figure out where your employees are in these grief stages and to lead them to the *acceptance* and *action* stages as quickly as possible.

Successful leaders earn a wage premium because they provide the foresight that allows the company to take calculated risks and outperform the competition throughout all phases of the business cycle. Leaders are graded by the health of a company over time. If, as a leader, you have slipped into a rut, the words of Winston Churchill summarize how your company will perform: "want of foresight, unwillingness to act when action would be simple and effective, lack of clear thinking, confusion of counsel until the emergency comes, until self-preservation strikes its jarring gong—these are the features that constitute the endless repetition of history". Successful leaders use clear foresight to avoid the repetition of history—even when history seems to have been rewarding.

There really is a "knowing vs. doing" gap. You have probably said to yourself at times in the



Michael Whitney

past, "I know that!" The real question becomes, "Yes, but do you *do* that?" Knowing and doing are two different things. Foresight comes from being able to *plan* for changing business conditions and then *enacting* your plans to keep your company ahead of the curve at all times.

Nothing is forever. For any association that you belong to, just look at who constitutes the roster of industry leading companies today versus 20 years ago. Do past leaders even exist today? Will *your* company be on the list in 20 years?

Being a successful leader all of the time is the expectation most employees, customers and investors place upon people at the top. That expectation is not always easy to fulfill. It shouldn't be expected to be easy. However, if a leader engages the seven action steps listed above the odds for success greatly increase—in both good and trying times.

Michael Whitney, president of Creative Strategies LLC, is an industry expert with 35 years of experience in business-to-business selling in capital goods industries. Michael's career has included ownership and presidency of manufacturing technology distributorships and importing companies that were consistently profitable with constant year-over-year profit growth under his management. To contact him, phone: 513/947-8165 or e-mail: mike@winningstrategy.com. ●

“ Successful leaders use clear foresight to avoid the repetition of history—even when history seems to have been rewarding.

earn your stripes as a leader during trying times.

According to Elizabeth Kubler-Ross (who proposed the now-famous pattern of phases people face when dealing with tragedy) there are five stages of grief:

1. *Denial* – business will come right back, this is just a momentary hiccup.

2. *Anger* – I've worked hard and struggled to make this company great, so why is this happening to me?

3. *Bargaining* – just let me live through this and I promise I'll get this company shaped-up and listen to my customers better.

4. *Depression* – enough is

- Based on pressing your company's existing competitive advantages

- Well communicated to everyone on your team

- Cheerfully administered by company leadership

- Based on understanding your company's breakeven point

- Based on constantly challenging your employees and customers to find new value and new solutions for problems you can solve profitably

- Focused not only on quantitative measures of performance but qualitative measures as well, and

- A willingness to celebrate

news and notes

NPES CALENDAR

September 2008

PRIMIRSM Fall Meeting

September 3-5 • Portsmouth, New Hampshire

NPES India Trade Mission and Print Summit

September 8-12 • New Delhi, India

TC130 Working Groups and Plenary

September 22-27 • The Netherlands

October 2008

EXECUTIVE OUTLOOK[®]

October 25 • Chicago, Illinois

GRAPH EXPO[®]

October 26-29 • Chicago, Illinois

November 2008

ICC Meetings

November 6-8 • Portland, Oregon

ICC DevCon '08

November 10 • Portland, Oregon

NPES Annual Conference

November 15-17

Don CeSar Beach Resort
St. Pete Beach, Florida

December 2008

PRIMIRSM Winter Meeting

December 3-5 • Baltimore, Maryland

March 2009

ICC Meetings

March 3-6 • Paris, France

NPES Industry Summit 09

March 24-27 • Washington, DC

May 2009

TC130 Working Groups 1-4

May 18-23 • Dallas/Ft. Worth, Texas

June 2009

ICC Meetings

June 15-18 • Tokyo, Japan

September 2009

PRINT[®]

September 11-16 • Chicago, Illinois

June 2009

ICC Meetings

November 5-7 • Albuquerque, New Mexico

October 2010

GRAPH EXPO[®]

October 3-6 • Chicago, Illinois

HURLEY'S TRADEWISE DO TELL INTEL

Global Market Place Opportunities

The printing markets in emerging world economies continue to grow rapidly, with local businesses demanding and evaluating the latest technologies to increase the quantity, quality and profitability of their production and business operations. To satisfy this demand, major local marketplace events are organized to put buyers, sellers and prospective business partners together, as will be happening later this year at three signature conferences and trade shows in India, China and Russia.

On the stage of a market where commercial, newspaper, package and digital printing are growing upwards of 12%, **the Indo-American Print Summit, presents a premier leadership forum to forge new partnerships between two hundred Indian and American industry leaders**, government authorities and media representatives. The objective of the Summit, **September 11-12 in New Delhi**, is to promote business relationships through better understanding of respective business environments, comprehensive knowledge of respective industries, optimizing **face-to-face interaction between**

Indian and American enterprises, and promoting trade and business opportunities for them.

Against the backdrop of China's huge potential of printing market and the **rapid growth of the Chinese printing market demand at 15% annually, All in Print China, actively supported by Messe Dusseldorf, is expected to be another global printing event following drupa** in 2008, offering the global printing industry a great platform for exhibition, exchange and transaction, further meeting the needs of both exhibitors and visitors, **through successful business matching.**

The 3rd China International Exhibition for All Printing Technology & Equipment (All in Print China 2008) will be **held in Shanghai at the New International Expo Center from November 14 to 17**. NPES will be participating as an exhibitor with a business development booth there and encourages NPES members interested in developing new business there to contact Johanna Buehler for further information at phone: 703/781-5188 or e-mail: jbuehler@mdna.com. NPES and its China staff will be on hand to help participating member exhibitors have a successful show.

As the digital printing market in Russia continues its rapid growth, **On Demand Russia** has been organized to inform and

educate print providers and their customers about the value of digital printing technologies, and through its conference and exhibition to accelerate market education and development. The event—focused on digital printing technologies including printing equipment, workflow software, direct-to-plate, and wide format printing—will take place **November 18-21, 2008** at the Sokolniki Culture and Exhibition Centre in **Moscow, Russia.**

For further detail on these markets and NPES assistance for events in India, Russia, China, or elsewhere, contact Mike Hurley at phone: 703/264-7212 or e-mail: mhurley@npes.org.

Sources: Economist Intelligence Unit, NPES India, NPES Russia and Messe Dusseldorf North America

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