



CANON SOLUTIONS AMERICA

ENHANCING THE PRINT
CUSTOMER CONNECTION
**DELIVERING CLIENT
EXPERIENCES THAT
BUILD COMPETITIVE
ADVANTAGE**



A NAPCO Research Study and White Paper
Sponsored by Canon U. S. A., Inc.

Delivering Client Experiences that Build Competitive Advantage

Building strong customer relationships goes beyond delivering high-quality print products and services. All customer touch-points and communications — from job quotes to submission to delivery — influence a client's experience. Today's customers expect their print providers to offer smooth onboarding, easy order submission processes, ongoing communication, effective job management, value-added services, and security measures.

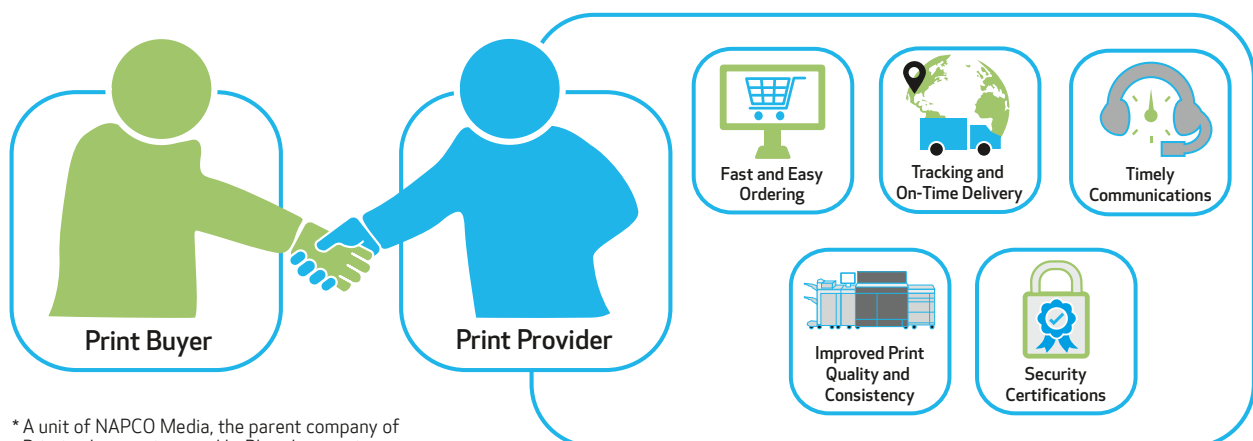
Meeting customer expectations may require print providers to make ongoing investments to help improve communications with customers, achieve color quality requirements, speed turnaround times, and ensure on-time product delivery. At the same time, focusing on helping to enhance customer experiences can add productivity benefits.

Looking to define and understand the best practices and methods for improving the print provider/customer connection, a 2021 NAPCO Research* study and white paper series, sponsored by Canon U.S.A. Inc., offers insights into job submission trends, customer communication requirements, workflow automation, and the many business and productivity benefits that enhancing customer connectivity can provide.

Enhancing the Print Customer Connection centers on seamless and transparent experiences between print providers and their customers, from job quotes through delivery. Enhancing customers' overall service experiences can build stronger client relationships that are less likely threatened by price competition. According to NAPCO Research's 2019 *Digital Printing 5.0* research series, also sponsored by Canon U.S.A., 53% of print providers surveyed reported that competitive pressures to lower pricing is a key force impacting profitability.

The *Enhancing the Print Customer Connection* research aims to identify buyer expectations and print providers' actions in meeting their requirements. Applying these research findings can help to enhance customer experiences, increase customer utilization of web-to-print ordering, guide investments, and improve marketing efforts.

Delivering Client Experiences that Build Competitive Advantage



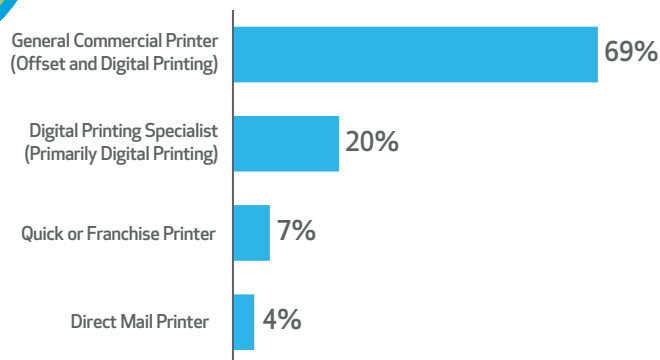
* A unit of NAPCO Media, the parent company of Printing Impressions and In-Plant Impressions.

Over 200 Print Providers and Print Buyers Surveyed

The study surveyed 193 commercial printers, 80 in-plants, and 211 communication buyers to assess print job submission and production trends across the print supply chain. Figures 1 and 2 describe the types of printers participating in this study.

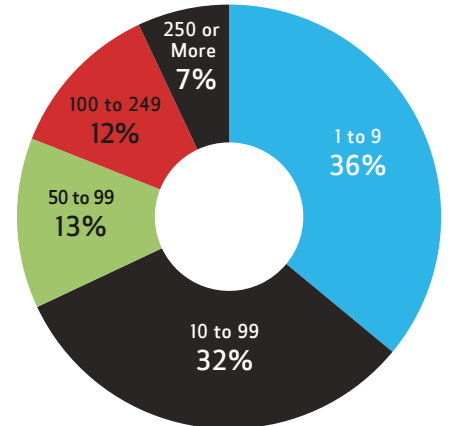
Figure 1
Commercial
Printer Respondent
Profiles

Primary Business



Q. Which category best describes your company's PRIMARY business?
N = 193 Commercial Printers

Employees

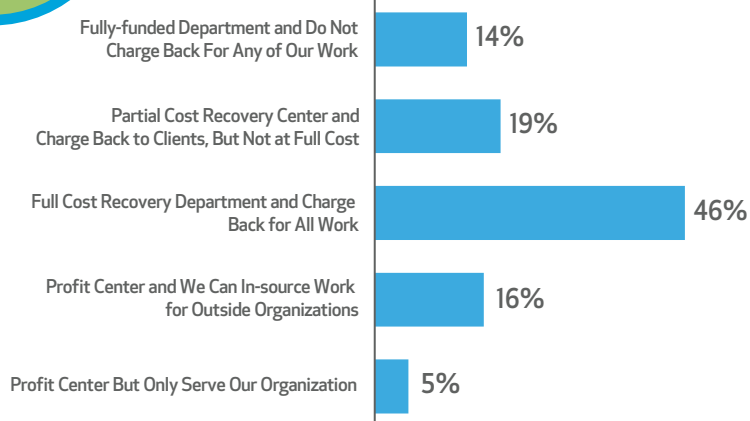


Q. How many employees work at your company or in-plant?
N = 193 Commercial Printers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

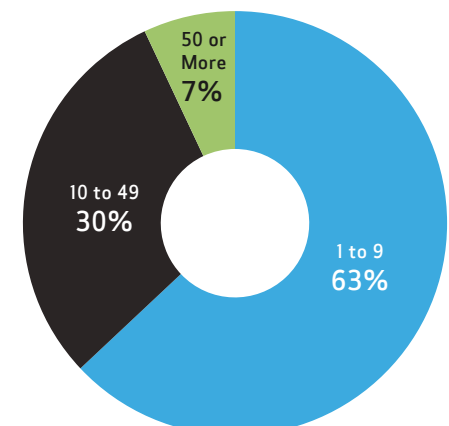
Figure 2
In-Plant
Respondent
Profiles

Operating Model



Q. Which of the following best describes your In-plant operation?
N = 80 Commercial Printers

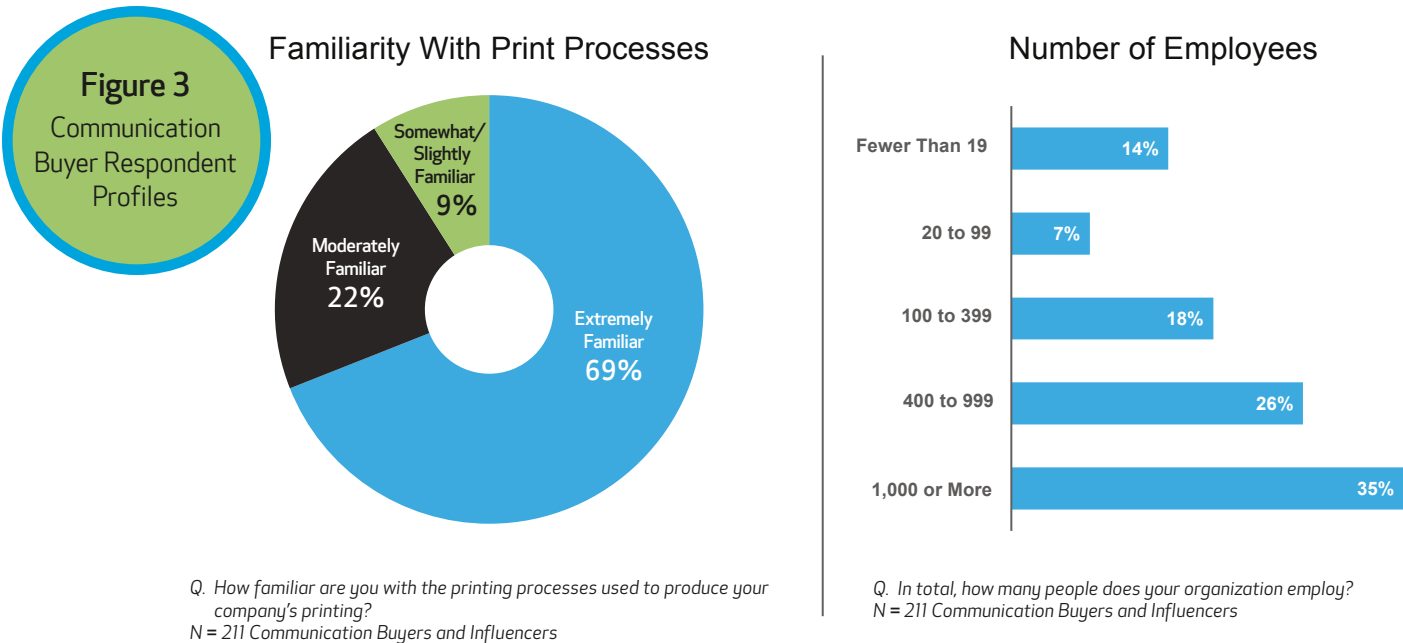
Employees



Q. How many employees work at your company or in-plant?
N = 80 Commercial Printers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Over 200 communication buyers (print buyers and influencers) (Figure 3) participated in the survey. Respondents hold top-level or key management positions and work at organizations representing a mix of sizes, with most employing over 100 people. To qualify to take the survey, communication buyer respondents needed to either purchase or influence print and be familiar with the methods used by their organizations to submit print jobs. Over two-thirds of respondents (69%) report that they're extremely familiar with printing processes used to produce their organization's printing work while 22% are moderately familiar and 9% are somewhat/slightly familiar.



Source: Enhancing The Print Customer Connection, NAPCO Research 2021

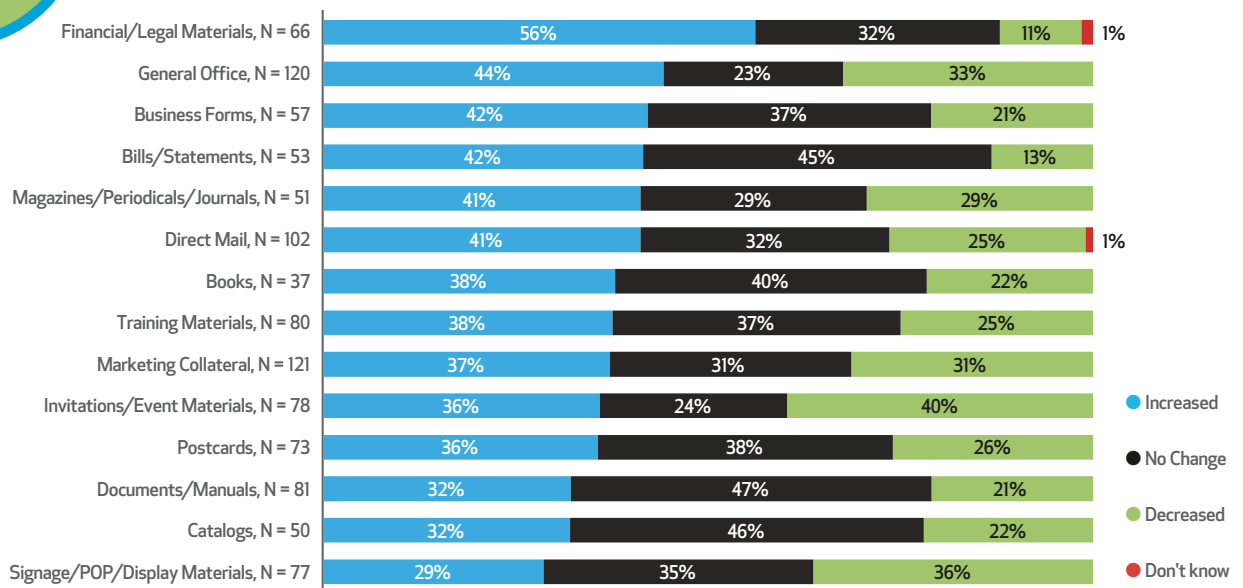
The majority of communication buyer respondents (63%) has been involved in purchasing or influencing print for six years or more. Two-thirds of respondents (66%) report having an in-house printing operation.

COVID-19 Reshaped Customer Interactions

The COVID-19 pandemic disrupted all facets of business and forced organizations to rethink how they engage and connect with their customers. As stay-at-home orders prohibited in-person customer meetings, virtual collaboration emerged to fill in the void. Many experts believe that, in the future, virtual customer experiences will continue as they reduce travel time and expenses required for in-person meetings.

The pandemic also influenced print demand. Commercial printer (86%) and in-plant (91%) respondents report the pandemic has reduced some customers' use of print, but some communication buyers and influencers surveyed report an increase in some applications, or they have held steady (Figure 4).

Figure 4
COVID-19
Influence on Print
Application
Volume



Q. Of the print applications you influence or purchase, how has the COVID-19 pandemic influenced print volume?
N = Communication Buyers and Influencers

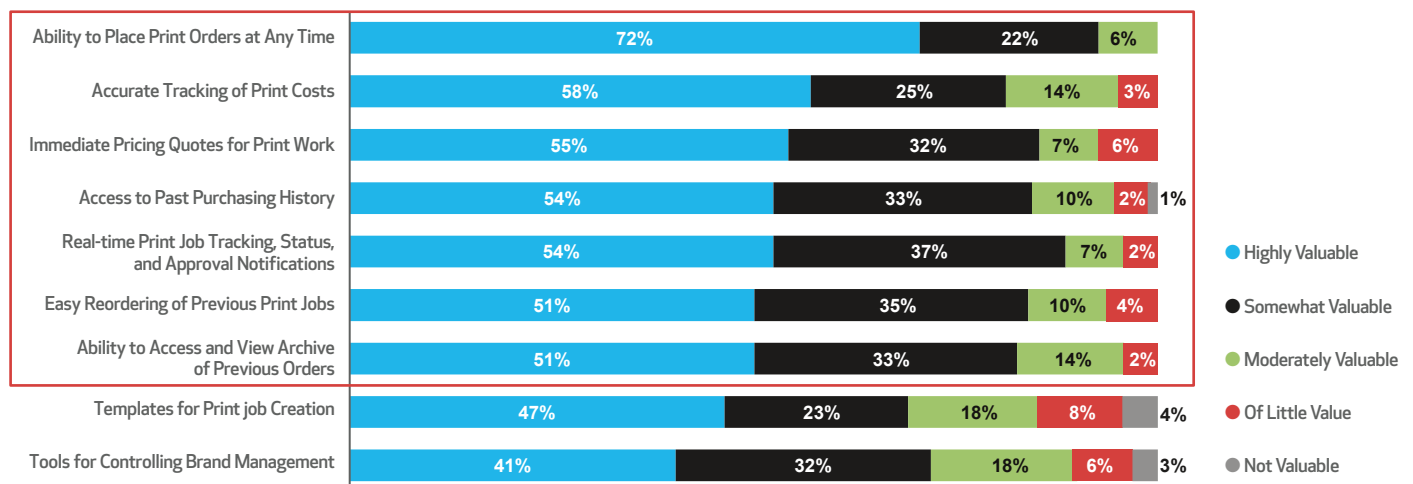
Communication buyer respondents report that printed materials that support events and venues where people gather, such as invitations, event materials, and sign and display graphics, posted the greatest decreases. Print buyer respondents indicate that mission-critical applications, such as financial/legal materials, statements, and forms, were the most resilient during the pandemic.

Two-thirds of commercial printers and 55% of in-plants report that the COVID-19 pandemic strengthened their customer relationships because they added new products and services to meet emerging customer needs.

What Do Communication Buyers Value?

Creating great client experiences begins with identifying what customers deem important. Over half of communication buyers surveyed value services that enable better management and visibility of their print orders and costs (Figure 5). Almost three-quarters (72%) report that placing print orders at any time is highly valuable. In addition, over half deem real-time access to print job status, cost tracking, and price quotes as valuable to their organizations.

Figure 5
Communication
Buyers Value
Agility, Accuracy,
and Access



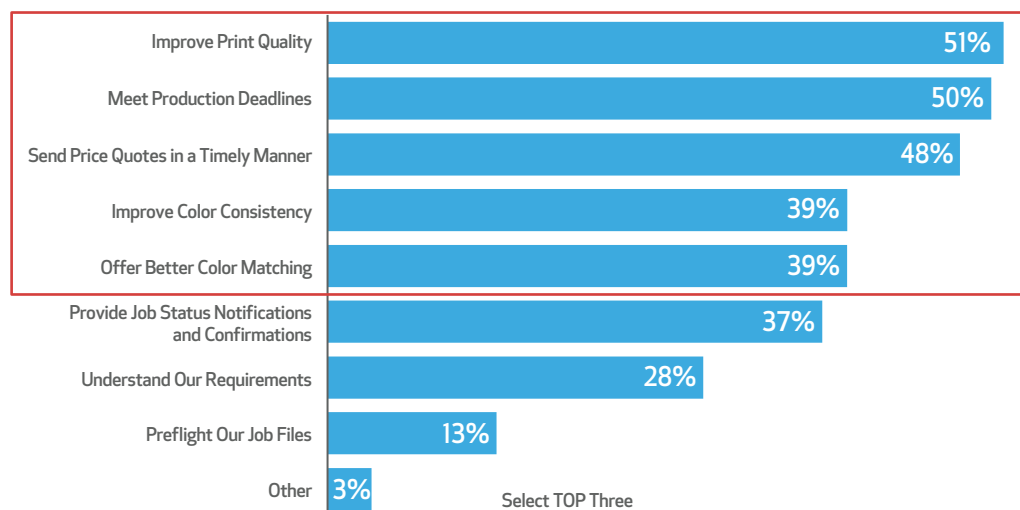
Q. Please rank the value that the following capabilities provide to your organization.
N = 211 Communication Buyers and Influencers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

These findings indicate that today's communication buyers demand higher levels of management control over their print ordering and spending. Many are under enormous pressure to reduce costs and maximize the return on their communication investments. This presents an opportunity for print providers that offer customers tools and processes to better access, manage, create, and control print production and spending. Offering such services to help manage and track their print projects can help build stronger customer bonds that may not be as easily broken by competitors offering lower prices.

The survey asked communication buyers to select the top three areas their print providers can improve. The highest responses were for improving print quality, meeting production deadlines, and sending price quotes in a timely manner (Figure 6). Other areas center on color quality and better communication on print job status.

Figure 6
Top Three
Areas Print
Providers Can
Improve



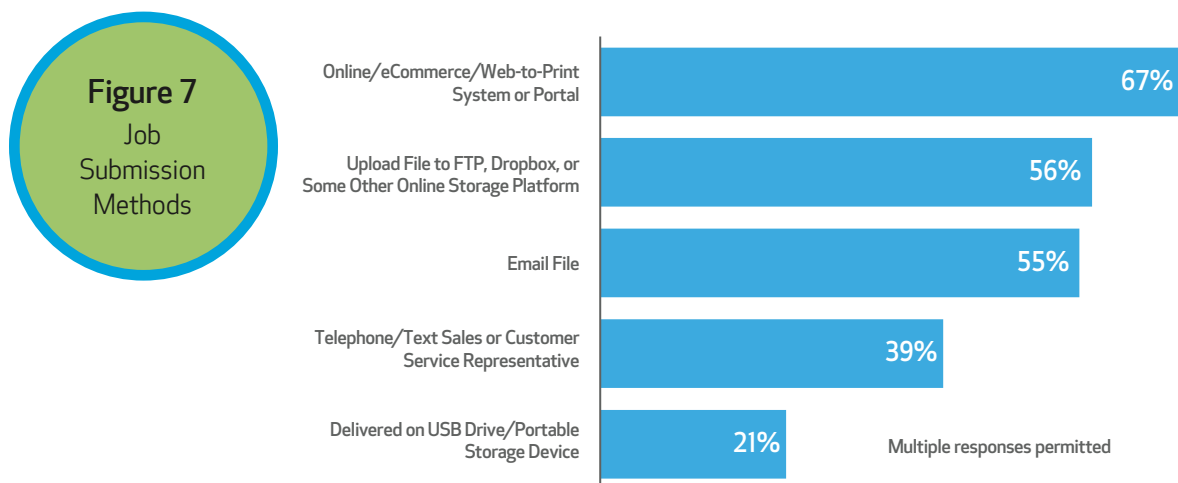
Q. What are the top areas where your print provider(s) can improve in producing your jobs?
N = 211 Communication Buyers and Influencers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Customers Expect Multiple Job Submission Options

Making it easier for print customers to place orders, submit jobs, monitor work status, control branding, and better manage spending can ease their anxiety and help to enhance their print provider experience.

Over half (55%) of buyer respondents believe it's very important for their print provider to accept files via multiple methods. Communication buyers report using multiple print job submission methods (Figure 7). Over half report submitting jobs via an online portal, file upload platform, or email. This response demonstrates that buyers need to utilize different methods for submitting print work. This may be a result of the print application type they're submitting or, if working with multiple print providers, the requested job submission method(s).



Q. How does your organization submit print jobs to your print providers?
N = 211 Communication Buyers and Influencers

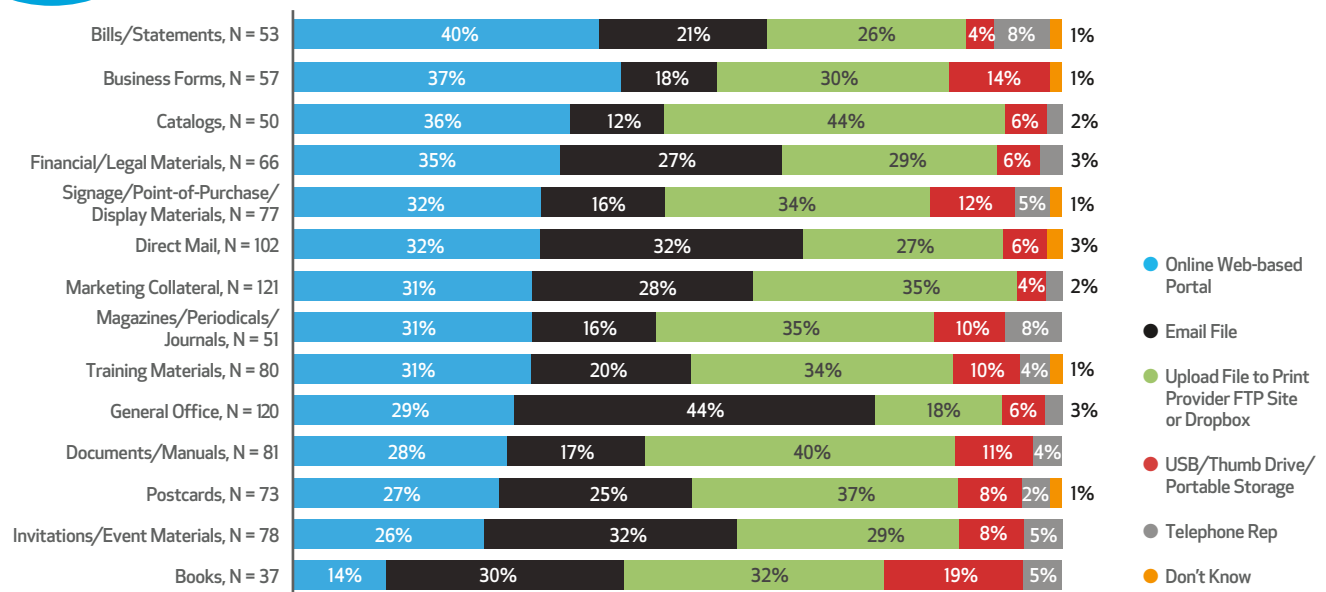
Source: Enhancing The Print Customer Connection, NAPCO Research 2021

There were some interesting key findings here:

- Online print job submission used the most.
- Portable storage device used the least.
- Emailing print files used by over half of respondents.
- Over one-third submit jobs through a sales or customer service rep.

Respondents use various job submission methods for the applications they print. Figure 8 highlights buyers' most common job submission methods for typical print applications.

Figure 8
Job Submission
Method by
Print Application

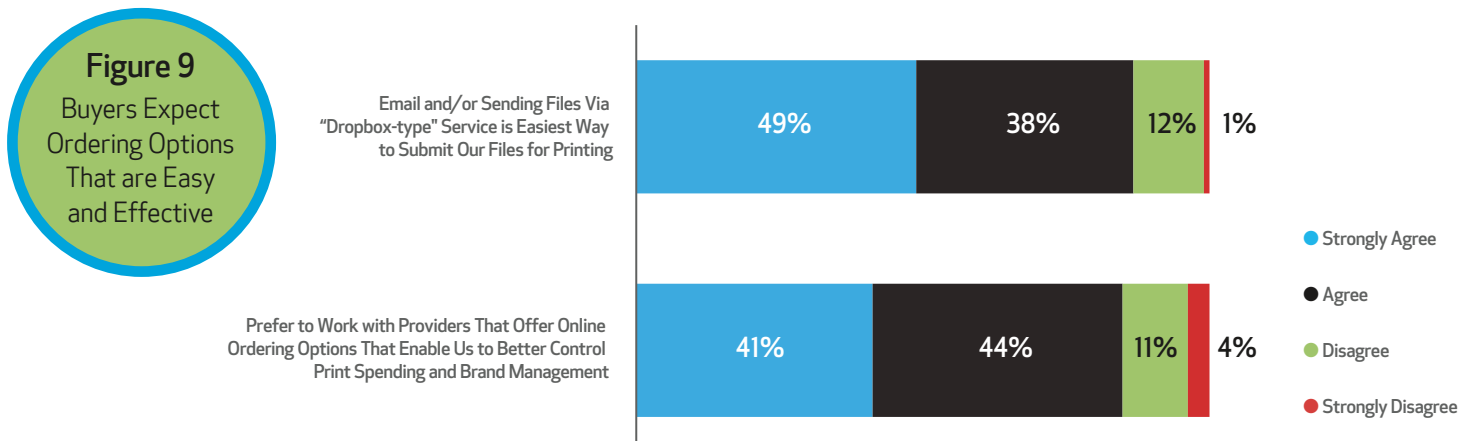


Q. Of the print applications you influence or purchase, what is the most common method for submitting a job to your print provider(s)?
N = Communication Buyers and Influencers.

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

More communication buyers report using a mix of methods to submit work to providers. While online web-based/eCommerce portals tend to offer many powerful job management tools, the majority of jobs are still being submitted by uploading files to an online storage platform, such as FTP or Dropbox, or simply emailing a file. The top three benefits derived from emailing or uploading job files are ease of use, fast way to send files, and confidence in the process.

Communication buyers want print providers to offer job submission options that are easy to use and enable process monitoring, control, and management (Figure 9), as they'd like to better control spending and brand management. To help increase the use of online web portals for job submission, print providers need to educate customers on how these solutions add value and efficiency to their organization. Efforts to help on-board customers to your online web ordering platform should help address these needs.



Q. What is your level of agreement with the following statements?
N = 211 Communication Buyers and Influencers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Overcoming Online Job Submission Obstacles

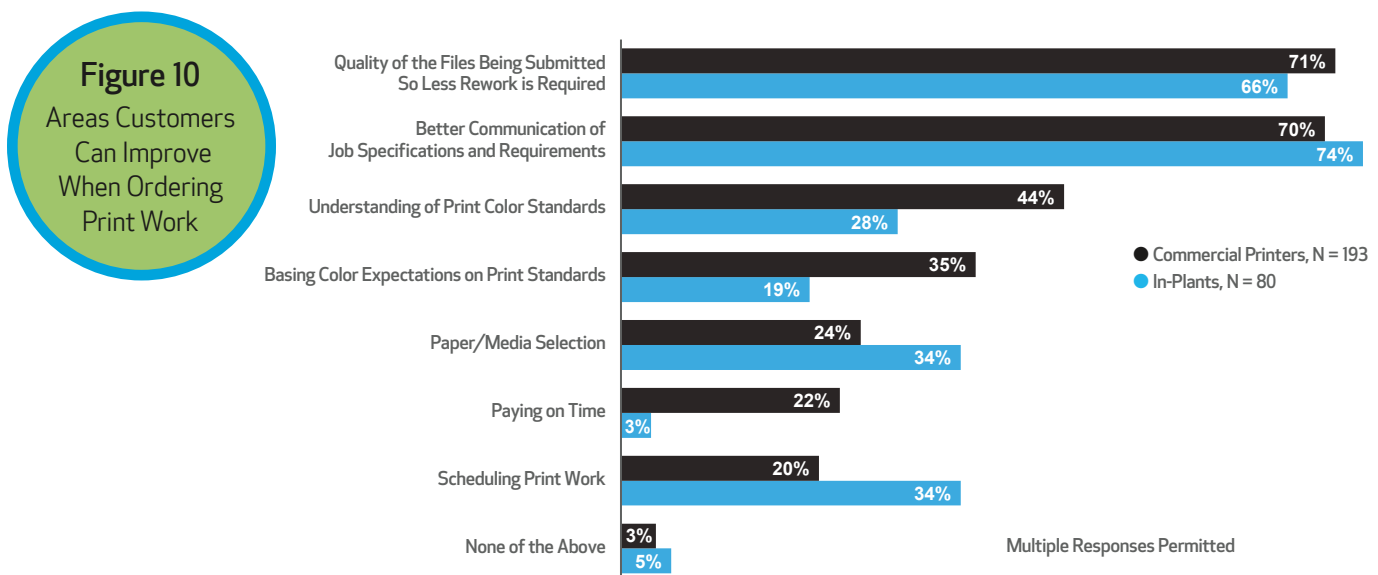
While most communication buyers (73%) report that online job submission capabilities are very important when selecting a print provider, they also identified various adoption obstacles:

- Implementing a print vendor's job submission portal reduces flexibility and bargaining power with print suppliers: 76%
- Print providers don't explain how the benefits of online ordering/job submission done via their portal will deliver benefits specific to their customer's organization: 71%
- Having multiple print vendors makes it difficult to learn each vendor's job submission solution: 68%
- The benefits of online ordering presented by print providers don't outweigh the work required to integrate these systems and train staff: 84%

Understanding these obstacles is an important step in working with clients to provide options that can meet their requirements.

Ways to Help Improve Job Submission

Commercial printer and in-plant respondents acknowledge there are areas where customers can do better and they're providing clients with tools for improvement. They report that customers often send print files that require rework, don't adequately communicate job requirements, and lack understanding of print color standards and paper/media selections (Figure 10).

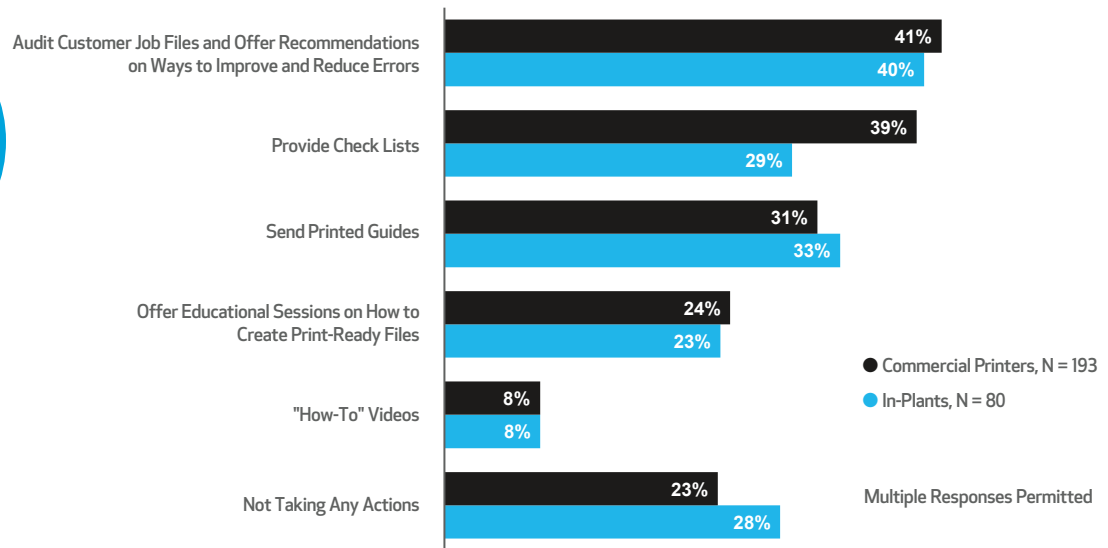


Q. What are the top areas where customers can improve in ordering and specifying print jobs?

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Over three-quarters of commercial printers and 72% of in-plant respondents report supplying customers with tools and support to improve file preparation and job submission; 23% of commercial printers and 28% of in-plants report taking no action (Figure 11). These respondents are supporting customers in improving file preparation by auditing customers' job files, providing preflight check lists, supplying printed guides, and hosting educational sessions.

Figure 11
Actions of
Print Providers
to Educate
Customers



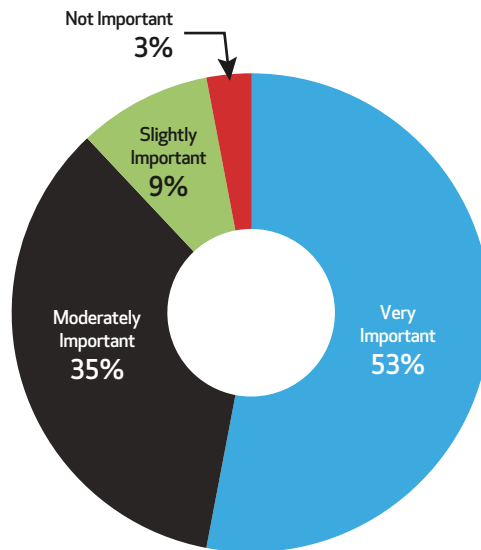
Q. What actions are you taking to better education customers on print file preparation?

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Meeting Customer Security Demands

For many print customers, data security is of key importance. More than half of respondents (53%) say that, when selecting a print provider, it's very important the company has security certifications and processes in place (Figure 12). Commercial printer respondents report that customers are requiring protocols on their files and data storage (34%), various security compliances and certifications (i.e., HIPAA, ISO, GDPR, PCI) (31%), systems and process that protect personal identification data (20%), and IT reviews/audits of cloud-based solutions and file storage (19%).

Figure 12
Importance of
Certifications and
Policies to
Protect Security



Q. When selecting a print provider, how important is having certifications and policies in place to protect security?
Base = 211 Communication Buyers and Influencers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

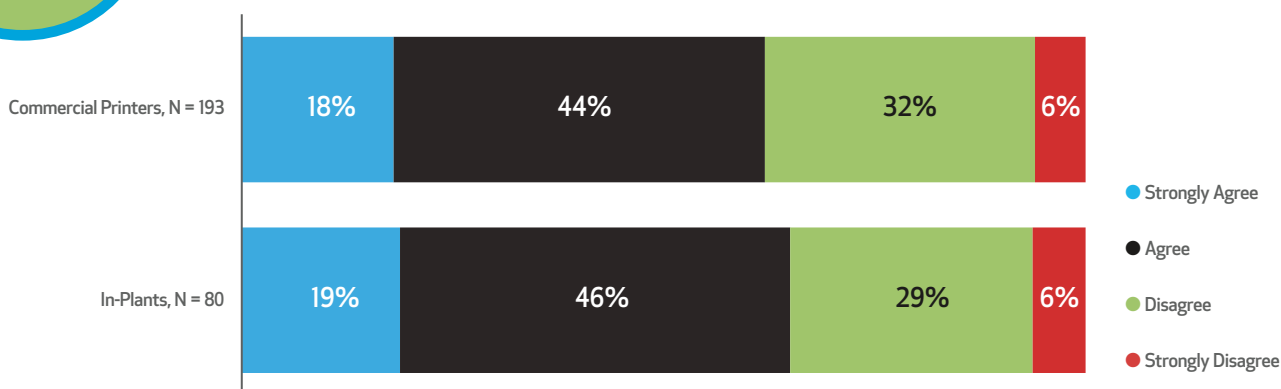
As for in-plant respondents, this group reports that their customers' top security demands include requiring employees to complete security training program (30%), systems and process that protect personal identification data (25%), criminal background checks on new-hires (24%), and various security certifications (i.e., HIPAA, ISO, GDPR, PCI) (23%).

Customer Connectivity Supports Automation Benefits

Print provider respondents indicate automation as the single most important element keeping their operations profitable (Figure 13). Automated print production workflows help ensure that all stages of the production process are performing at peak efficiency for print providers and customers.

Figure 13
Print Providers
Understand the
Value of
Automation

Automation is the single most important element in keeping a print provider operating in the black today.



Q. What is your level of agreement with the following statement:

Automation is the single most important element in keeping a print provider operating in the black today.

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Successful printing organizations are in a never-ending pursuit to increase efficiency, improve quality, and better serve customers. Commercial printers and in-plants participating in NAPCO Research's 2019 *Digital Printing 5.0* survey identified customer job submission, managing a high number of small jobs, and increasing throughput/shortening production times as key challenges to workflow automation. Additionally, those commercial printers reporting double-digit sales growth incorporated higher levels of automation. In-plants also reported major efficiency gains due to workflow investments, with such results as improved productivity, decreased turnaround times, and increased customer satisfaction.

Automation can help improve customer experiences and helps to meet the demands for quality, faster turnaround, color consistency, and real-time job status visibility/connectivity. Print workflow automation starts with online customer job submission.

In taking steps to improve customer experiences and overcome ongoing challenges in operating an efficient workflow, it's important to stay focused on workflow methods and tools that help support the production of shorter print runs, more diverse jobs, and numerous order submission channels. Ongoing evaluation of workflow processes — from job receipt to preflighting, prepress, and production — is among best practices to consider.

Conclusion

Communication buyers prefer to partner with print providers that are easy to work with and able to meet diverse job requirements. All points along a customer's print project — from job quoting and submission to security features, status reports, and completion — influence customer satisfaction and loyalty.

As this research indicates, there are many opportunities for print providers to help communication buyers improve job submission methods while, at the same time, improving their operation's backend automation. Though email may be the easiest way to send a job file, it does little to streamline print production processes and customer communications. Transitioning customers from emailing print job files to alternative file submission methods requires educating them on the many benefits these other solutions offer, such as gaining higher levels of management control over their print ordering and spending.

Print providers that supply customers with job submission tools, support, and education—including file preparation audits, preflight check lists, guidelines, and training sessions—are more likely to convince communication buyers to submit their print work via an online option that helps improve print production automation and operational efficiency.

As market price competition continues to be an ongoing threat, print providers that research and invest in ways to enhance their connection with customers can build strong customer relationships that competitors cannot easily infiltrate.

About Enhancing the Print Customer Connection

Enhancing the Print Customer Connection is a series of thought-leadership content pieces based on a NAPCO Research survey of communication buyers, commercial printers, and in-plants that was sponsored by Canon.

1. Delivering Client Experiences that Build Competitive Advantage
2. The Job Submission Challenge – Onboarding Your Customers
3. Navigating a New Customer Environment
4. Advancing Productivity and Service Delivery
5. Strengthening the Value of the In-Plant



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