

PRINT IN THE EYE OF THE BUYER
ENHANCING THE
IN-PLANT CUSTOMER
EXPERIENCE



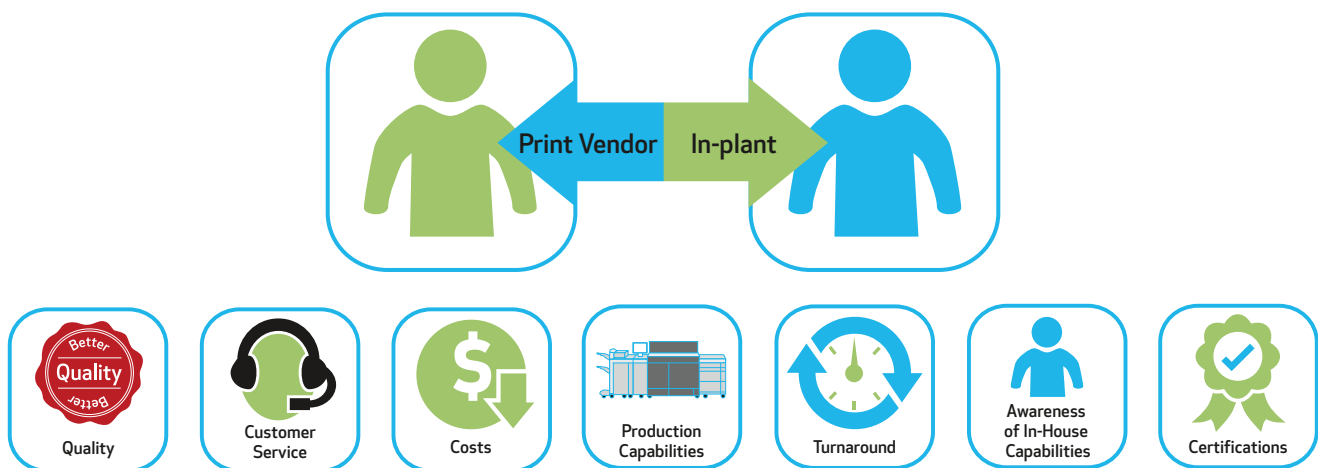
Enhancing the In-Plant Customer Experience

In-house printing operations may have captive customer bases, but creating positive customer experiences is still important. Given the continual threat of parent organizations outsourcing print to facilities management companies, in-house printing operations that focus resources on delivering excellent customer experiences can strengthen client relationships and help reduce the threat of work going to outside vendors.

Internal printing operations, also known as “in-plants,” offer their parent organizations many valuable benefits, including cost savings, faster turnaround time, convenience, and control. Compared to print providers outside of an organization, the in-plant typically understands corporate priorities, brand standards, and the critical turnaround time needed for specific applications. In addition, in-house printing facilities help provide a level of security that’s important to many companies. They can also support more unique equipment and workflow configurations to better meet the needs of their parent organizations.

Creating positive print customer experiences requires understanding buyers’ needs; obtaining quality certifications; providing ongoing, relevant communication outreach; offering efficient and easy-to-use processes; and meeting and/or exceeding expectations. In-house printing operations have the unique advantage of offering customers convenience and potentially lower costs due to their on-site presence and operating models. Still, they must meet customers’ requirements for print quality, turnaround times, and ease of use in order to compete with outside service providers. To achieve high customer satisfaction in these areas, in-plants must have the knowledge, skills, and leadership to provide the support their customers need.

What Influences Customers’ Print Sourcing Decisions



Research Uncovers In-Plant Customers' Trends and Requirements

To identify and define key characteristics of today's print buyers, this NAPCO Research* study and white paper series, sponsored by Canon U.S.A., Inc., surveyed more than 200 print buyers and influencers in early 2020.

The research offers insights on what print buyers and influencers expect from their in-house printing operation, ways to enhance the buyer experience, and strategies for engaging with buyers. In-plant operations that apply these research findings to customer engagement efforts can help strengthen organizational relationships, build loyalty, and increase print volumes. In particular, the research included questions directly related to how print buyers engage with their respective in-plant operation as well as their expectations.

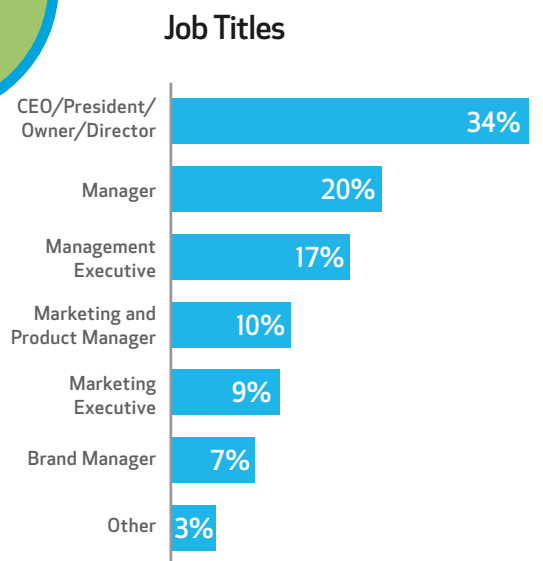
Most Organizations Surveyed Have In-Plants

The research study targeted print buyers and influencers. Of those surveyed, more than two-thirds (71%) report that their company has an in-house printing operation that, on average, handles 63% of their print volume.

Figures 1 and 2 describe the job titles and company size of respondents with in-house printing operations. Respondents represented various job titles (executives, brand owners, marketers, designers, and procurement staff), as many levels of an organization are involved in purchasing and specifying print and communication projects. This research report refers to all respondents in the survey group as "print buyers."

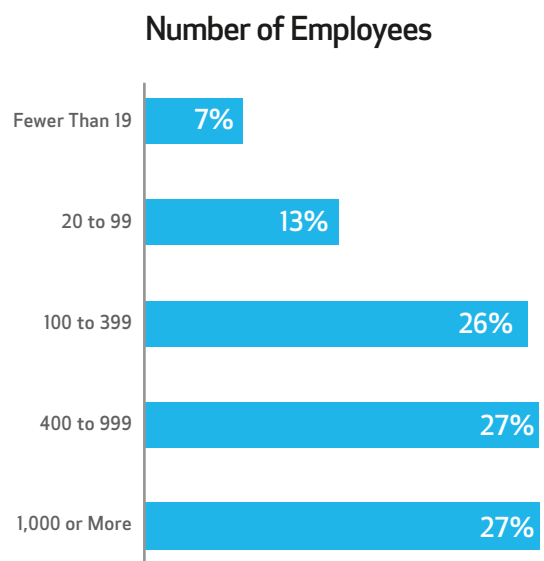
Larger companies, those with more than 100 employees, were more likely to have an in-house printing operation; 80% of respondents with an in-plant employed 100 or more people.

Figure 1
Respondent Profiles



Q. Which of the following describes your role in the organization?
N = 166 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020



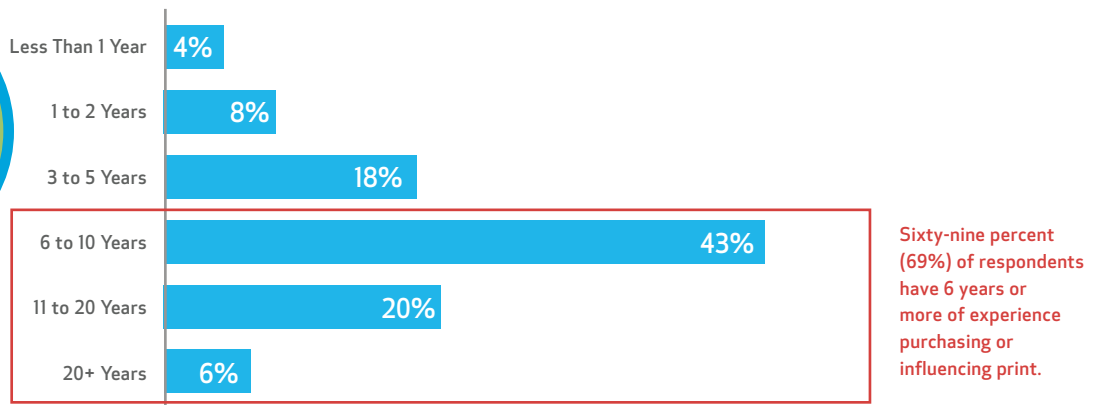
Q. In total, how many people does your organization employ?
N = 240 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

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

To qualify to take the survey, respondents needed to either purchase or influence print buying. The majority of respondents had significant experience with print procurement, with 69% having six years or more, and 92% having over two years.

Figure 2
Respondent
Printing
Experience

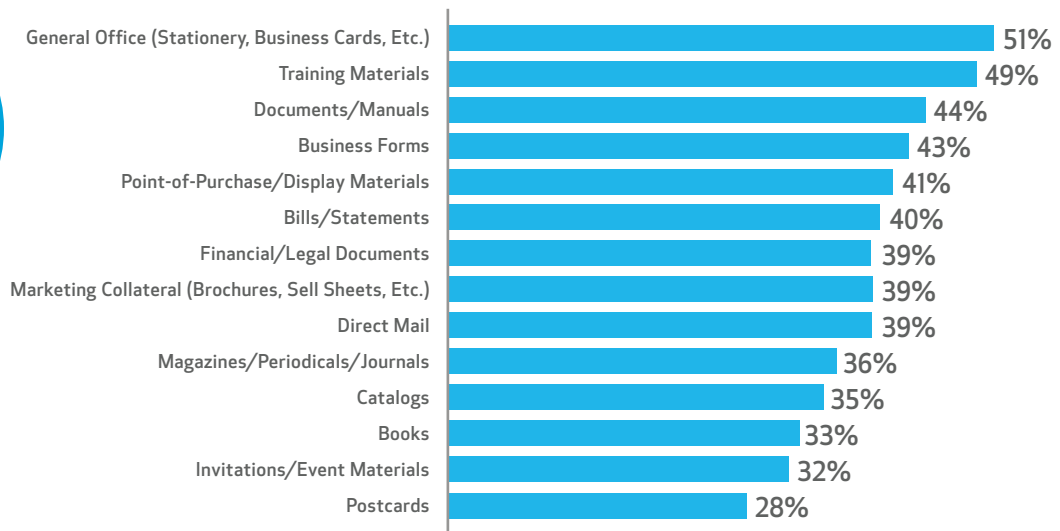


Q. How long have you been involved in purchasing or influencing print?
N = 166 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

As Figure 3 indicates, respondents have experience with many different print applications, ranging from marketing and promotional materials, to transactional documents, to publications and training materials.

Figure 3
Print
Applications
Purchased or
Influenced



Q. Which of the following print applications do you influence or purchase?
N = 166 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Monitor and Measure Customer Satisfaction

A major concern of many in-plant managers is the threat of outsourcing the entire print operation. Respondents report that the top reasons for outsourcing print work to an external provider is to obtain better print quality, followed by a desire for a higher level of customer service (Figure 4). It's important to keep in mind that certain print jobs may be beyond the equipment and expertise that even a top-performing in-plant may be able to achieve. But even for those jobs within the in-plant's production capabilities, customers will go elsewhere if their needs and job requirements are not met.

Figure 4
Reasons for Outsourcing



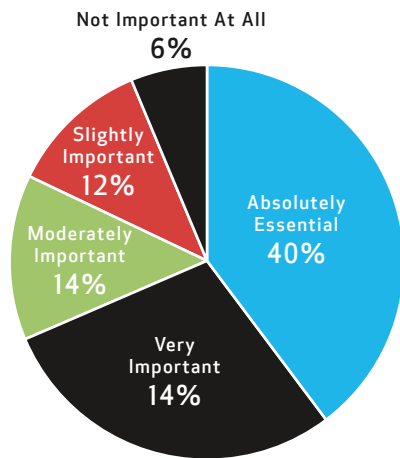
Q. What are the top reasons for outsourcing print work rather than having your organization's in-house department print it?
N = 146 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

As part of a best practices system intended to ensure accurate and consistent print quality, in-plant managers should proactively and regularly measure and monitor print quality. More than half of print buyer respondents with in-house printing operations report ISO 9000 and G7® certifications as very important when selecting a print provider. A little over three-quarters surveyed prefer to work with print providers that are G7 certified, and 40% said having a G7 certification was absolutely essential when selecting a print provider (Figure 5).

Figure 5
G7 Certification is Important to an In-Plant's Customers

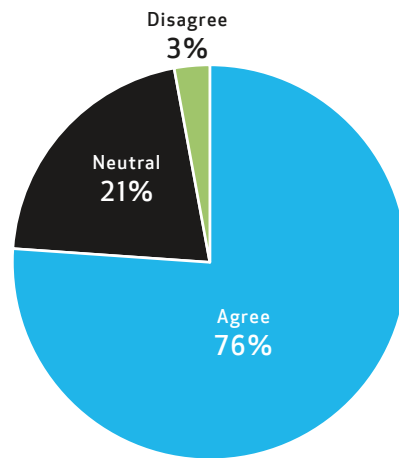
How Important is G7 Certification?



Q. How important is G7 certification when selecting a print provider?
N = 146 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Prefer to Work with Providers That Are G7 Certified



Q. Please describe your level of agreement: We prefer to work with print providers that are G7 color certified.

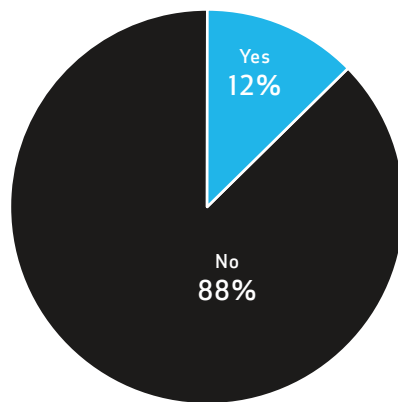
N = 165 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Despite buyers reporting outsourcing print work over better quality and preferring to work with print providers that have G7 certification, many in-plants lack quality and color certifications like G7 and GRACoL. According to the previous NAPCO Research/Canon U.S.A. study, *Digital Printing 5.0*, only 18% of in-plant survey respondents implemented G7, GRACoL, or other color specifications.

Implementing and achieving color certifications offer an in-plant many benefits. A key advantage is that it helps establish a process on how to manage color and deliver a repeatable process.

Figure 6
In-Plants Lag in Earning G7 Certification



Q. Has your organization implemented G7, GRACoL, or other specifications to optimize color across devices?
N = 121 In-Plants

Source: *Digital Printing 5.0*, NAPCO Research 2019

In-plants typically operate digital color printing systems that are similar to commercial printers, but they haven't implemented color quality controls such as G7. Many commercial printers promote their G7 certification, and this can be one reason why buyers outsource work. In-house printing operations that adopt and promote specifications like G7 can elevate quality and print buyers' perception of their capabilities.

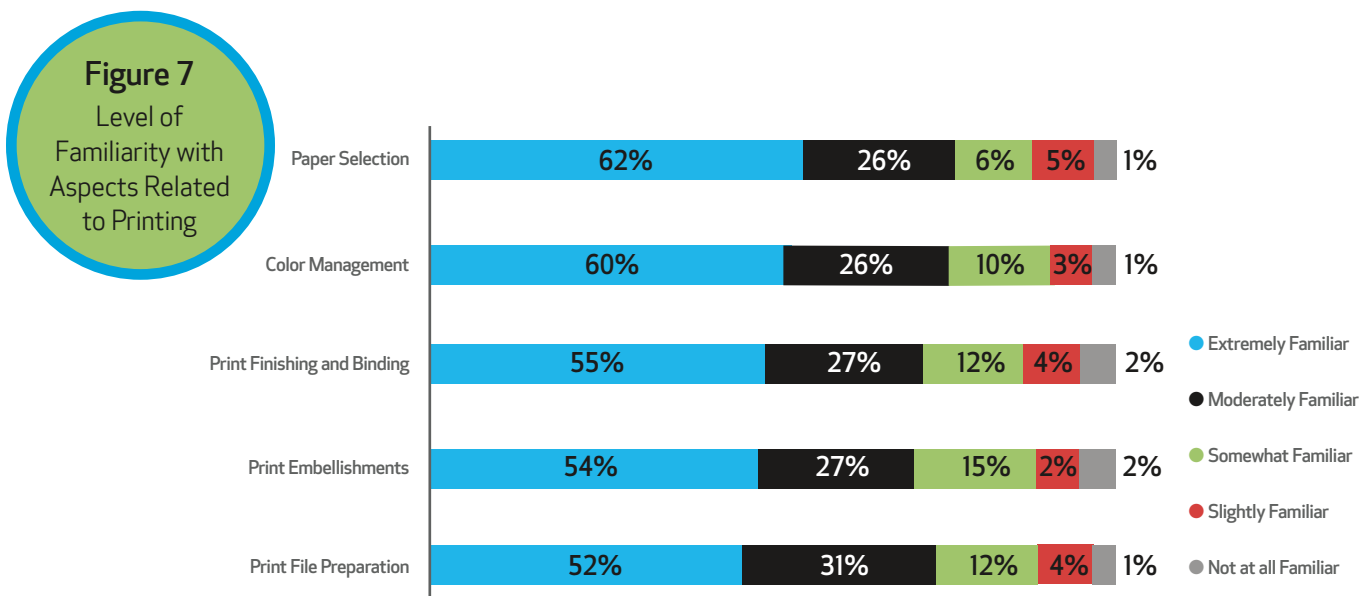
Higher customer satisfaction is another top reason survey respondents outsource print work. Successful in-plant managers have a good sense of whether or not their customers are happy and often survey customers on a frequent basis. Sending follow-up emails for feedback after a job was delivered and conducting quarterly, online customer satisfaction surveys and/or quarterly meetings with key customers to discuss problems, successes, and new ideas all help gather valuable insights.

There are numerous metrics and approaches that an operation can follow. The key message is that there must be some measurement process in place to track customer satisfaction and results. This is particularly important when an in-plant must prove its value to its organization when the outsourcing question arises. In-plants that present a solid case for their value—with metrics to support their story—have far greater chances of survival.

Customers Need Education on Ways to Improve Print

While many print buyers and influencers in organizations with in-plants report adequate experience with print procurement, they still require education about keeping up with technology innovations, methods for improving effectiveness and efficiency, and ways their in-house operation can support ongoing goals and objectives.

As Figure 7 indicates, print buyers and influencers with in-plants report that they're highly familiar with most aspects related to specifying and creating printing.



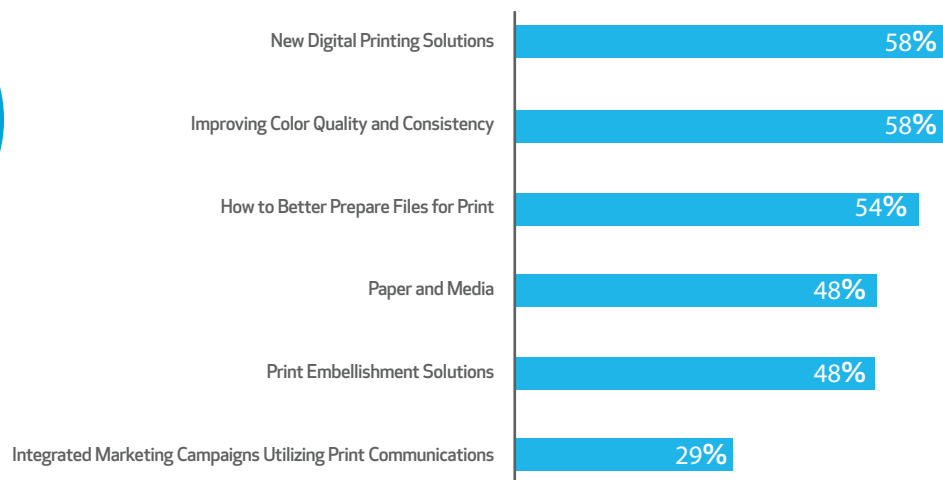
Q. Please indicate your familiarity in the following areas.
 N = 166 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

This finding doesn't mean customers won't benefit from education on paper selection, color management, finishing, embellishments, or file preparation—respondents indicate they want to learn more about these areas (Figure 8). Customers are hungry for knowledge on how to improve their print communications, no matter what their level of experience. So creating tools or hosting events that address internal customers' specific level of expertise can enhance the customer experience.

In-plants that are well informed in these areas should share this knowledge with their customers. This can be done in several ways: newsletters; webinars; emails as part of internal promotional campaigns; lunch-and-learn events; and, job consultations. Internal customers may not be fully aware of an in-plant's capabilities, so proactively informing them is critical for the in-plant, not only to remain relevant and competitive, but also to establish itself as a trusted partner in matters related to print.

Figure 8
Print Production
Areas Respondents
Want to Learn
More About



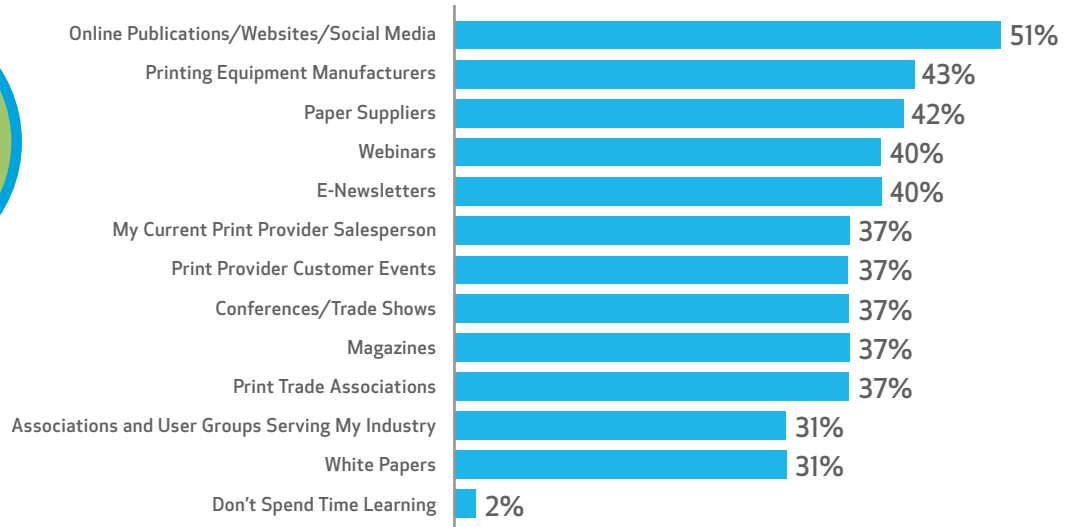
Q. Which of the following would you like to know more about regarding print production?
N = 166 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Actively Market and Reach Out to Customers

While customers can rely on their organization's in-plant to gain knowledge on printing issues, it's not typically their primary source of information. Survey respondents with in-plants report mostly using online sources, printing equipment manufacturers, paper suppliers, and webinars to stay current on printing trends and technologies (Figure 9). This finding suggests that in-plants should step up their efforts to provide customers information on print trends and technology. By doing so, in-plants demonstrate credibility and print knowledge, which are key attributes in building customer trust and improving the overall customer experience. It's also important for in-plants to demonstrate their printing abilities, as well as other services, before outside vendors do.

Figure 9
Resources Used to Stay Current on Printing Trends and Technology



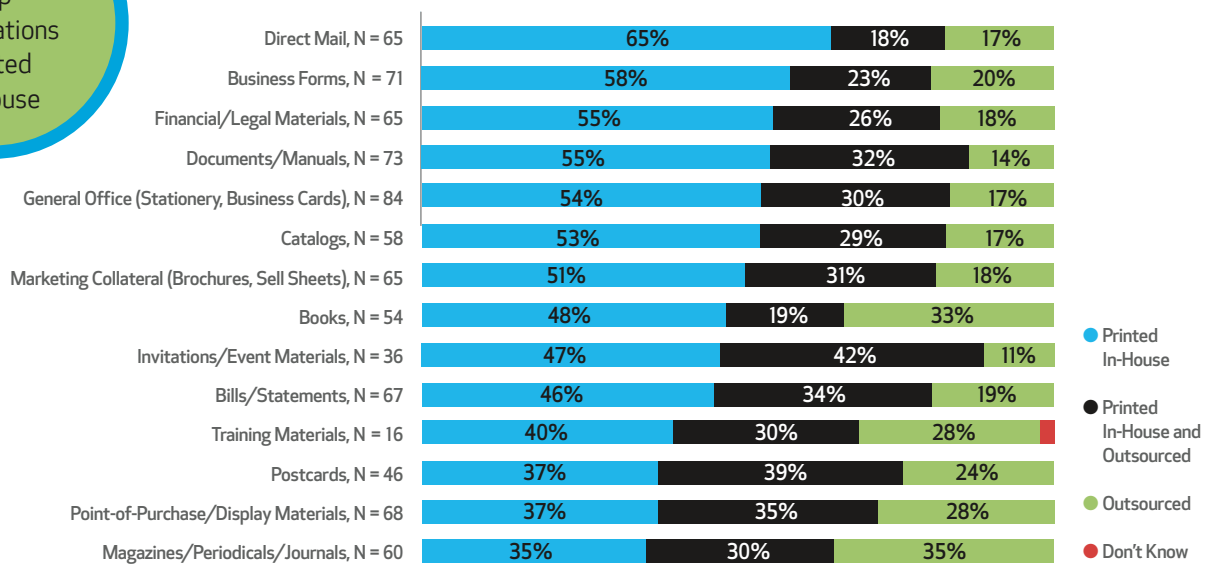
Q. What resources do you use to learn about, and stay current on, printing trends and technologies?
N = 166 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Build Expertise in Key Applications

To stay competitive, a print organization must have expertise in the key applications it produces. The types of print applications an organization requires are heavily related to its industry as well as the specific needs dictated by those departments with the greatest need for print, like marketing, finance, public/investor relations, human resources, legal, etc. Study respondents identified those applications typically produced in-house versus being outsourced. As Figure 10 highlights, direct mail was the top application, with 65% of respondents stating that it's printed exclusively in-house. Other applications more likely to be printed in-house were business forms, financial/legal materials, manuals, general office, catalogs, and marketing materials, with over 50% indicating that these applications are printed exclusively in-house.

Figure 10
Top
Applications
Printed
In-House



Q. Of the print applications your organization requires, are they printed in-house or outsourced?
N = Varies; Based on 166 Print Buyers and Influencers with an in-house printing operation

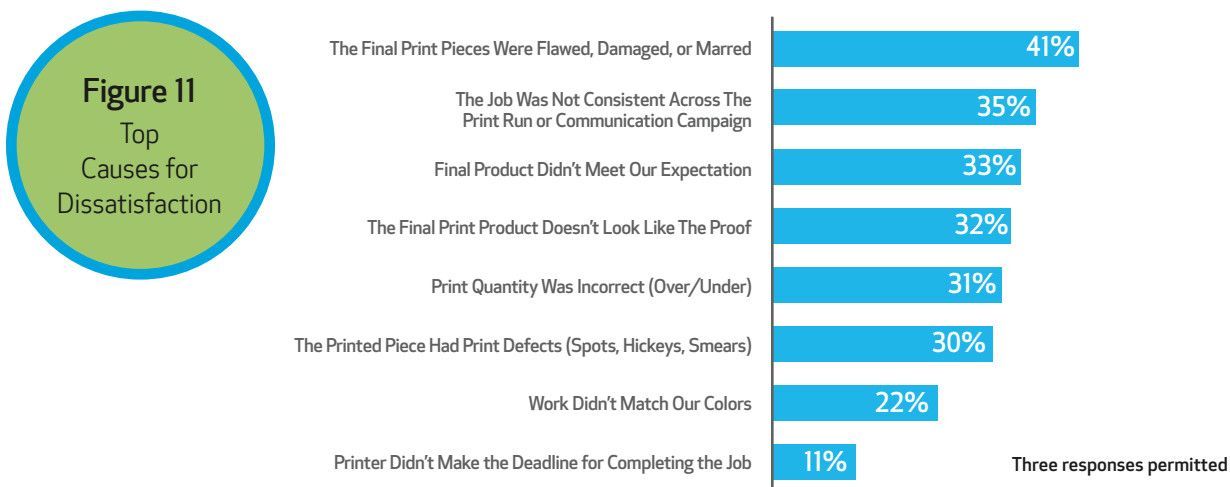
Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

In addition to printing expertise, in-plants need to understand other requirements that are essential for the success of a particular application, including finishing, mailing, data, regulatory requirements, or recipient needs. For example, consider a direct mail postcard that a university distributes regarding an upcoming enrollment deadline. Paying attention to details, like data accuracy and timeliness, is critical to ensuring that the document has fulfilled the goal of informing the recipient or prompting a call to action. Such expertise is essential to the in-plant staying competitive. In addition, demonstrating expertise also builds confidence with the customer and positions the in-plant managers and specialists as print application subject matter experts.

Showcase High Print Quality Standards and Services

The research survey identified that key areas of dissatisfaction among print buyers and influencers were primarily related to print quality, as shown in Figure 11.

While experienced production workers play a major role in helping to ensure customer satisfaction as it relates to print quality, equally critical in this role are managers, customer service representatives, and sales staff. These people are often closer to the customer, and so they better understand the needs, concerns, and/or anxieties of their clients. Additionally, with proper training, people in these roles can provide an added layer of review. For example, this can be helpful in confirming the operator's color matching assessment and/or identifying an error or issue that might have been missed. Ideally, these people should act as proxies for the customer throughout the print production process. Ultimately, it's the manager's responsibility to address these issues and implement practices that can help ensure maximum customer satisfaction.



Q. What are the top causes of dissatisfaction in the finished print work you receive from a print provider?
N = 165 Print Buyers and Influencers with an in-house printing operation

Source: *Print in the Eye of the Buyer*, NAPCO Research 2020

Conclusion

Competition from external print providers and managed print services organizations is an ongoing challenge for in-house printing operations. Successful in-plants understand the importance of customer satisfaction as well as the key metrics that help to demonstrate the financial and business benefits to their organization.

For services not offered in-house but yet required by print buyers, the in-plant can still play a vital role, either as a total print solutions partner managing relationships with third-party providers or as an advisor to the internal purchasing team. This allows in-plants to evaluate their own service capabilities first and then leverage external partners to enhance value where needed.

In-house printing operations that embrace strategies to enhance customer experiences are buffering against competitive threats from external vendors. Although speed, quality, and low-cost production are key when comparing external providers, new and effective differentiators include building client relationships and expanding customer outreach efforts. Using these strategies can help deliver customer experiences that offer value way beyond the print job.

About Print in the Eye of the Buyer

Print in the Eye of the Buyer is a series of thought-leadership content pieces based on a NAPCO Research survey of print buyers and influencers that was sponsored by Canon.

1. Identifying and Meeting the Needs of Today's Customers
2. Identifying Print's Role in the New Communication Mix
3. Enhancing the In-Plant Customer Experience
4. Enhancing the Print Customer Experience
5. Navigating Customer Purchasing/Procurement Processes

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