



# VERTICAL MARKET KIT

## UTILITIES

OCTOBER 2021





contents

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## Introduction

Utilities are essential services (e.g., energy, water, and telecommunication services) that play a vital role in people's everyday lives. Utility companies are public or private organizations that provide electricity, water, heat, communication access, or any other commodity required by a large amount of people for comfort or survival. The majority of utility companies supply energy (such as electricity and natural gas), a means of communication (such as the Internet, telephone, or television), or water to the general public.

According to ibisworld, the US utilities market was valued at about \$646 billion in 2021. Today's utility companies tend to fall into one of three different operating models: publicly owned, investor owned, and cooperatives. Each type of utility is funded and operated in a different way. The various operating models are outlined in the Table below.

**Table 1: Utility Company Operating Models**

Type	Description
<b>Publicly Owned</b>	Owned by cities, counties, or states, these firms produce their resources and then sell them to people or businesses. These not-for-profit organizations are designed to provide power, water, heat, or communication services to people at a low cost.
<b>Investor Owned</b>	Privately owned companies run by shareholders. Most are focused more on the delivery of utilities as opposed to production. Investor-owned utilities tend to have much larger engineering staffs, information technology departments, and operating budgets than other types of utility companies. None of the decisions these companies make are open for public review, and they have no obligation to operate in a transparent manner.
<b>Cooperatives</b>	Also called co-ops, these private organizations are created by the government to provide service to areas that do not offer enough of a profit to any investor-owned utilities. They are owned by the people whom they serve.

Even in today's electronic era, utility companies need printed communication materials to attract new customers, retain existing ones, and maintain day-to-day operations. Some businesses have found that printed direct mail can help them stand apart from their competitors. Most people are inundated with e-mails daily, so direct mail is the less cluttered channel. Furthermore, some people maintain a preference for paper communications, often because they serve as a tangible reminder to pay a bill or contact a provider.



Thanks to ongoing advancements in digital printing technology, utility firms have more opportunities to differentiate themselves than ever before. Digital printing processes enable:

- ◆ The production of relevant, personalized communications that can be targeted on an individual level
- ◆ Just-in-time, on demand manufacturing
- ◆ Workflow automation for more efficient production
- ◆ More cost-effective use of static or variable color
- ◆ High-quality color capabilities with inkjet technology

Digital printing technology also makes it possible to produce printed communications with foils, white/metallic inks, special textures, and other embellishments. The tactile nature of physical direct mail makes it more memorable than digital messaging, and printed communications can also be used to connect the recipient back to online channels for a true omni-channel experience.

Successfully selling print to the utilities industry involves understanding how the sector works, identifying key trends and influencers, locating decision-makers, and developing solutions and applications that are aligned with the market's unique and ever-changing needs. This vertical market kit is designed to serve as a reference and selling guide for assessing and capturing the digital printing opportunity within the utilities industry. It outlines the necessary fundamentals for achieving success in the market.



## Part 1: Overview of the Utilities Market

The utilities industry invests in communication products to sell services, provide updated information, collect payments, and educate consumers. Digitally printed communications support utility companies in client acquisitions and retention, customer service efforts, and efficient operations.

The utilities market offers many opportunities for print service providers (PSPs), especially those firms that support innovative personalized and multi-channel communication approaches to attract and retain customers. Key printed products include monthly bills and statements, newsletters, business cards, brochures, and educational materials. Communication efforts can also be maximized by linking printed materials to digital media channels.

### Types of Utilities

As summarized in the Table below, there are four basic types of utilities. Each type of utility is quite unique, so this subsection outlines all four in further detail.

**Table 2: Types of Utility Companies**

Type	Description
<b>Electric</b>	These businesses are involved in the generation, transmission, distribution, and marketing of electric power. Power is generated from hydrocarbons (such as coal, natural gas, or oil), nuclear, or renewable sources (such as solar, water, or wind).
<b>Natural Gas</b>	These firms are involved in the distribution of natural gas to commercial, industrial, and residential customers—and its marketing. Most companies in this segment are not involved in the extraction of natural gas or its transmission in pipelines.
<b>Water and Sewer</b>	These companies are engaged in water treatment, distribution, and sewage removal. The majority of water and sewer systems are government-owned, but there are for-profit systems. Most firms operate as monopolies, but with heavily regulated prices.
<b>Telecommunications</b>	These businesses are involved in the transmission of information. Major categories include cable television operators, Internet service providers, and telephone companies. Most telecommunications companies are not involved in the creation of content or information; only its delivery. Because content delivery requires extensive networks, companies typically use their networks to deliver multiple types of telecommunications.

### Electric Companies

Firms in this industry sector generate, transmit, and distribute electric power for sale in regulated markets. According to Statista, the number of electric utility companies operating in the US is about 3,300, and about 200 of these firms provide power to the



majority of users. The residential sector accounts for the majority share of the global electric utilities market, followed by commercial and industrial sectors. In the past, electric companies were monopolies that controlled the entire process, from power generation through to retail supply. Today, the sector is separated into four supplier segments:

- ♦ **Generators** create electrical power. While established utilities continue to build and operate plants that produce electricity, a growing number of merchant generators build power capacity on a speculative basis or have acquired utility-divested plants. These firms then market their output at competitive rates in unregulated markets.
- ♦ **Energy network operators** sell retail service providers access to their grids and distribution networks. Heavily regulated, they are natural monopolies because attempting to duplicate their far-reaching networks would be expensive and redundant.
- ♦ **Energy traders and marketers** buy and sell energy and other derivatives and create complex structured products. These companies do something very useful: they help utilities and power-hungry businesses secure a dependable supply of electricity at a stable, predictable price.
- ♦ **Energy service providers and retailers** are newer market players that buy power at competitive prices from transmission operators and energy traders and then sell it to end users—often competitively bundled with gas, water, or even financial services.

Electric utilities owned by investors are for-profit businesses and assets are privately owned. In most cases, these utilities are large firms that tend to serve a major sector of the population. Investor-owned utilities are regulated by governments, who instruct them on when and how to acquire land and set up plants. Alternatively, rural electric cooperatives are owned by customers and thus operate on a non-profit basis. These cooperatives usually consist of customers that join the group by paying a small membership fee. These fees and personal loans are used to buy equipment.

### **Natural Gas Utility Firms**

Firms in this sector buy and operate natural gas distribution systems. Natural gas distributors buy gas from producers or gas marketers and distribute it to local customers via networks of pipelines. Gas is moved from production regions via high-pressure transmission pipelines to gate stations operated by local gas utilities, where flow rates are measured, pressure is reduced to distribution levels, and odorants are added so that consumers can smell gas leaks. Distribution lines get smaller as they near customers, further reducing pressure. Customers include residential, commercial, and industrial users of natural gas.

### **Water and Sewer Utilities**

Water is one of the most valuable and, in some regions, one of the scarcest resources in the world. Water utilities are primarily engaged in water treatment, distribution, and sewage removal, which include collection, treatment, and disposal of waste through



sewer systems and sewage treatment facilities. The industry is highly regulated as it needs to meet stringent hygiene standards and there is no product differentiation.

Historically, water utilities firms have not placed a significant emphasis on marketing. After all, water utilities have primarily focused on safety and supply, and rates were established through political process and cost evaluation. The marketplace, however, is changing. Supply problems are increasing the requirement for voluntary and mandatory conservation programs that must be “sold” to customers. In addition, citizens may be asked to vote and approve massive new investments in infrastructure and security. As a result, water utilities firms now have an increasing need to communicate with and market to customers.

### **Telecommunications**

Telecommunication companies operate or provide access to facilities for voice, data, text, sound, and video transmission through wired, wireless, or satellite networks. Statista estimated US industry revenues at over \$580 billion in 2020. Telecommunications service providers build, maintain, and operate networks to reach customers. Networks can be built by physically laying wires, building transmission towers, and interconnecting switching centers. Networks can also be assembled by buying existing facilities or leasing capacity on another company's network. Computers are at the heart of all telecommunications facilities.

In the past, telecommunications revenues were typically sourced from traditional landline and wireless services. Today, opportunities for revenue creation are expanding all the time because the range of products and services available to the industry continues to increase.

According to the United States Telecom Operators Country Intelligence Report, revenue growth in the telecommunications industry will primarily be driven by mobile data and fixed broadband revenues. Mobile data service revenues are expected to rise from \$130 billion in 2019 to nearly \$212 billion by 2024, demonstrating a compound annual growth rate (CAGR) of 10.2%. Fixed broadband service revenues will achieve a CAGR of 3.7% during the same timeframe, surpassing \$77 billion by 2024.

Telephone services are bought by consumers, businesses, and government agencies. Marketing is typically confined to the area in which a company offers service. Most companies use TV, radio, print, outdoor signage, internet, point-of-sale, and direct mail advertising to reach consumers and small businesses, as well as a direct sales force to reach large businesses. Wireless companies also sell their services through company-operated retail outlets and mass merchants.





Internet sales are another important component of the telecommunications industry. Large companies operate extensive websites that enable customers to purchase products and services as well as make changes to their existing services. Customers can get answers to questions about their services via e-mail, phone, instant chat, or chatbots.

Because the cost of one individual communication over a telephone, cable, or data network is so small compared to the cost of establishing the network, firms primarily sell fixed-price subscriptions, generally in tiers based on usage levels. Telecommunications resellers purchase network access and capacity from carriers and resell services to businesses and households. They can often charge lower prices and offer more flexible plans than traditional carriers, because they obtain bulk access to networks at wholesale rates.

## Major Market Trends

### *Marketing is Becoming an Area of Focus*

In the past, utility companies typically didn't practice marketing because they were monopolies with no competition. Today, however, marketing is playing a more important role in the utilities sector as industry players strive to increase brand recognition and improve public relations. Brand recognition enables utility companies to sell add-on products as well as deregulated products that may also be part of their businesses. Meanwhile, good public relations efforts can help during negotiations with politicians in what has become a heavily government-regulated industry.

Utility companies are focusing on promoting products and services, improving customer care, and improving public perception. Marketing departments in utility companies are increasingly being asked to communicate with core stakeholders and customers across media channels to demonstrate cost-effectiveness and return on investment. Some firms are also focusing on relationship-driven marketing, and these efforts are paying dividends in the form of a more engaging customer experience, increased customer retention, and stronger growth.

### *Customer Satisfaction Takes Center Stage*

In the past, utility companies viewed users as captive consumers rather than customers who actively chose and paid for their services. This perception has since changed due to increased competition, stringent regulations, and evolving consumer demands. As a result, utility firms are now treating consumers as unique customers whose demands must be addressed in a relevant manner.

Utility companies have historically operated reactively, with negative customer experiences—like an outage or billing issue—often driving engagement. Thanks to continued growth in smart technologies, utility firms can offer customers a wider range of



programs and services to monitor and manage energy use. The emergence of smart networks, with smart appliances, meters, transformers, pumps, or any network asset capable of capturing customer data in near or real time is enabling utility providers to become more attuned to their customers' needs. Armed with this knowledge, firms can proactively engage their customers to increase satisfaction and improve retention. Smart technologies are enabling utilities to offer personalized and non-commoditized services to their customers, while allowing them to make informed decisions about their consumption. Regulators are also increasingly calling upon utilities to improve their relationships with customers and incorporate efficiency measures within the existing infrastructure.

***As the costs associated with handling complaints and managing legislative requirements have increased, utilities firms have made improving customer service a top priority. With this increased focus on customer satisfaction and retention, utility firms are prioritizing more frequent and proactive communications with customers.***

### **Targeting New Community Members**

Businesses and consumers relocate to new areas all the time, and they have become important customers for utility companies. When someone moves into a new home or building, securing utility services is often a top priority. Many utility firms are working to attract new residents by creating "welcome to the neighborhood" packages with bundles, giveaways, or special discounts. This is a great way for utility companies to make a good impression with new community members.

### **Mobile Technology Improves Communication and Operations**

In an effort to satisfy growing customer expectations, utility companies are making mobile communications a high priority. What debuted with field service reps and technicians using mobile to devices to collect data and communicate remotely has spread to end customers. Utility companies have also recognized the potential of mobile communication in other areas. For example, mobile can be used for a range of customer service applications such as outage alerts, rapid communications with customers in critical situations, savings advice, high bill alerts, data overage alerts, and usage information.

Utility companies are building mobile apps to better serve customers and support what the industry is calling "demand response." Apps can enable consumers to see how much of a particular resource they're using (water, electricity, gas, data, phone minutes, etc.) and what it costs. Armed with this information, customers can better understand their usage patterns and make changes to reduce costs. For example, if a customer sees that electricity usage costs more at certain times of the day, he/she may opt to use less power during peak times.



Consumers who fully understand how much energy, network data, and water they use may be more likely to alter their consumption habits. For utility companies, this can mean fewer outages and a reduced load on the network. Meanwhile, consumers can benefit from lower bills.

### ***Smart Meters Facilitate Communication***

A smart meter is an electronic device that records the consumption of electric energy in intervals of an hour or less and communicates that information back to the utility for monitoring and billing. Although smart meters enable two-way communication between the meter and the utility company, they create customer communication opportunities as well as challenges. The information provided by smart meters enables utility firms to improve service, better manage demand, and enhance customer response efforts. Even so, some consumers remain skeptical of these monitoring systems.

Smart meters are considered an essential next step in modernizing the electrical grid, because they enable customers to more closely monitor their energy usage while also allowing utility firms to sell electricity at different prices during the day depending on overall demand. Smart meters are key component for improving demand response programs and other energy-efficiency programs. Utility firms can interact with their customers more frequently, and customers can also make more informed decisions about their energy use and manage their power in real time.

### ***Leveraging the Power of Social Media***

Utility companies are using social media as a public relations and customer service tool. These firms are using social media to communicate with customers during service outages and inform the public of infrastructure projects, energy conservation, safety issues, and green energy investments.

Utility firms typically have high social visibility and provide good customer service, but there are opportunities to improve their social presence. They can do this by taking more control of the conversation. By sending more of their own tweets, for instance, firms can steer the discussions toward topics of their choosing. There is also an opportunity to better align audience and brand activity on social media. This can have a very positive effect, as timely replies are important and expected in today's fast paced world.

### ***Driving Sales with Transactional Documents***

Essential customer communications, such as account statements and bills, can often be one of the most successful—and cost-effective—ways to deliver marketing messages and increase sales. Utility companies can use the white space on their transactional documents to up-sell and cross-sell offerings to existing customers. In the telecommunications industry, these messages may promote a new phone, a new service,



or a new option for an existing service. For utility companies, especially those using smart meters, messages can advise consumers on how to use their gas or electricity more efficiently and responsibly.

## The Utilities Market is Strong and Dynamic

Like so many others, the utilities industry is continually reinventing itself to respond to consumers' changing demands, capitalize on the latest trends, and sell new offerings. Although the industry hasn't abandoned more traditional communication tactics like print, it has strengthened them with new technologies and practices that maximize customer engagement, build loyalty, and help improve the overall customer experience.

**Table 3: Global Resources for the Utilities Industry**

Associations	Publications
<b>American Public Power Association (APPA)</b> <a href="http://www.publicpower.org">www.publicpower.org</a>	<b>Electric Light &amp; Power and POWERGRID International</b> <a href="http://www.clp.com">www.clp.com</a>
<b>American Gas Association (AGA)</b> <a href="http://www.aga.org">www.aga.org</a>	<b>Energy Central</b> <a href="http://www.energycentral.com">www.energycentral.com</a>
<b>American Public Gas Association (APGA)</b> <a href="http://www.apga.org">www.apga.org</a>	<b>Municipal Sewer and Water</b> <a href="http://www.mswmag.com">www.mswmag.com</a>
<b>American Water Works Association (AWWA)</b> <a href="http://www.awwa.org">www.awwa.org</a>	<b>Power</b> <a href="http://www.powermag.com">www.powermag.com</a>
<b>Edison Electric Institute (EEI)</b> <a href="http://www.eei.org">www.eei.org</a>	<b>Telecommunications Magazine</b> <a href="http://www.telecomengine.com">www.telecomengine.com</a>
<b>Electric Power Research Institute (EPRI)</b> <a href="http://www.epri.com">www.epri.com</a>	<b>Utility Products</b> <a href="http://www.utilityproducts.com">www.utilityproducts.com</a>
<b>Electric Power Supply Association (EPSA)</b> <a href="http://www.epsa.org">www.epsa.org</a>	<b>Utility Week</b> <a href="http://www.utilityweek.co.uk">www.utilityweek.co.uk</a>
<b>National Association of Energy Service Companies (NAESCO)</b> <a href="http://www.naesco.org">www.naesco.org</a>	<b>Water Finance &amp; Management</b> <a href="http://www.waterfm.com">www.waterfm.com</a>
<b>National Association of Water Companies (NAWC)</b> <a href="http://www.nawc.org">www.nawc.org</a>	<b>Waterworld</b> <a href="http://www.waterworld.com">www.waterworld.com</a>
<b>Telecommunications Industry Association (TIA)</b> <a href="http://www.tiaonline.org">www.tiaonline.org</a>	
<b>Utilities Technology Council (UTC)</b> <a href="http://www.utc.org">www.utc.org</a>	

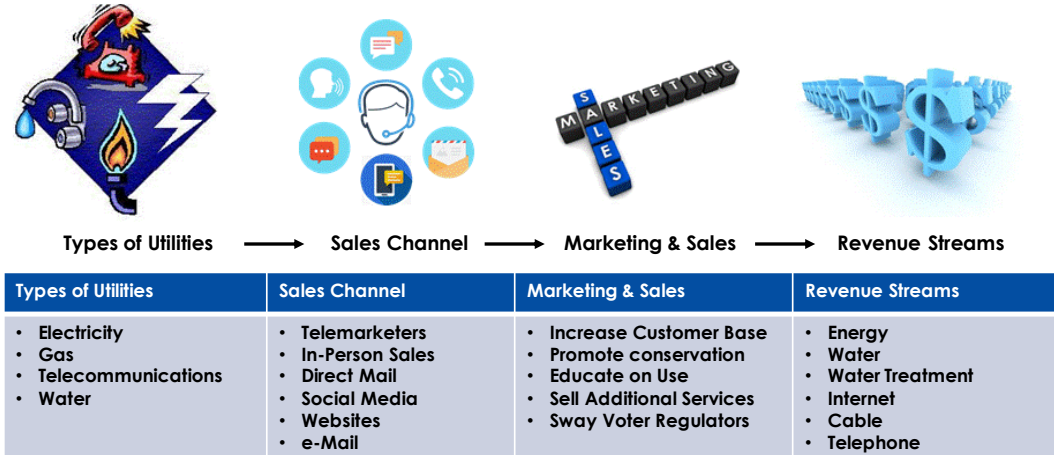


## Part 2: Selling Printed Communications in Utilities

### Defining the Communications Opportunity

As shown in the Figure below, the fundamental components of the utilities industry include the various types of utilities, the channel for selling utilities, the focus of marketing and sales efforts, and the revenue streams that support operations. Each component requires communication products and services that support its unique role. There are many opportunities for selling digital printing products within the industry.

Figure 1: Core Components of the Utilities Industry



Utility companies use a number of communication methods to engage with consumers and businesses as they strive to provide service announcements, update customers on new services, and offer tips to reduce costs. Specific types of digital printing applications aligned to key functional areas are outlined in the table below.

Table 4: Digital Print Applications Supporting Utility Firms

Operations	Marketing & Sales	Revenue Streams
<ul style="list-style-type: none"> <li>Annual Reports</li> <li>Bills/Invoices</li> <li>Business Cards</li> <li>Checks</li> <li>Compliance Documents</li> <li>Contracts</li> <li>Directories</li> <li>Employee Materials</li> <li>Envelopes</li> </ul>	<ul style="list-style-type: none"> <li>Advertisements</li> <li>Booklets</li> <li>Brochures</li> <li>Business Cards</li> <li>Calendars</li> <li>Direct Mail</li> <li>Door Hangers</li> <li>Envelopes</li> <li>Flyers</li> <li>Folders</li> </ul>	<ul style="list-style-type: none"> <li>Advertisements</li> <li>Banners</li> <li>Brochures</li> <li>Direct Mail</li> <li>Folders</li> <li>Forms</li> <li>Information Packages</li> <li>Newsletters</li> <li>Postcards</li> <li>Presentations</li> </ul>

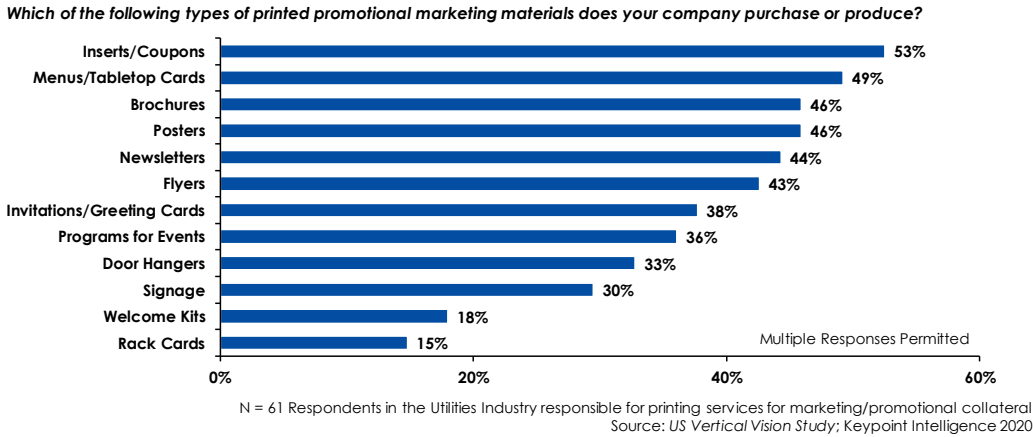


<ul style="list-style-type: none"><li>• Environmental Impact Statements</li><li>• Forms</li><li>• Invoices</li><li>• Labels</li><li>• Maintenance Guides</li><li>• Maintenance Schedules</li><li>• Manuals</li><li>• Maps</li><li>• Payroll</li><li>• Posters</li><li>• Proposals</li><li>• Reports</li><li>• Safety Data Sheets</li><li>• Sales Orders</li><li>• Service Bulletins</li><li>• Shipping Labels</li><li>• Signage</li><li>• Stationery</li><li>• Training Materials</li></ul>	<ul style="list-style-type: none"><li>• Labels</li><li>• Letterhead</li><li>• Newsletters</li><li>• Postcards</li><li>• Presentations</li><li>• Price Lists</li><li>• Price Sheets</li><li>• Proposals</li><li>• Sell Sheets</li><li>• Service Bulletins</li><li>• Signage</li><li>• Surveys</li><li>• Product Information</li><li>• Welcome Kits</li></ul>	<ul style="list-style-type: none"><li>• Price Lists</li><li>• Price Sheets</li><li>• Proposals</li><li>• Publications</li><li>• Reports</li><li>• Sell Sheets</li><li>• Signage</li><li>• Thank You Cards</li></ul>
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Communication products and services support the development and flow of offerings throughout the industry. In 2020, Keypoint Intelligence conducted an in-depth study to better understand the print and communication practices of various vertical industries. Within the utilities sector, the most common printed promotional marketing materials included inserts/coupons, menus/tabletop cards, brochures, and posters.



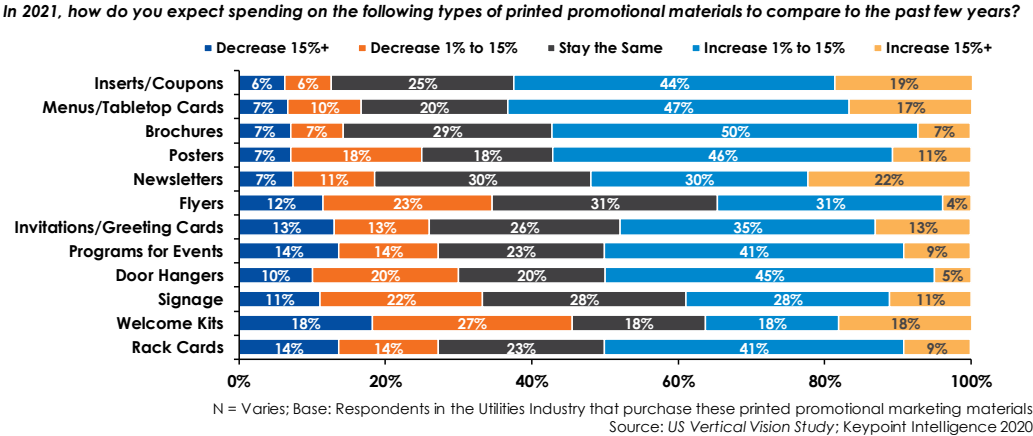
Figure 2: Printed Promotional Marketing Materials



Many of the applications in the Figure above can be delivered across media channels, and all strongly align with the benefits of short-run, on-demand, personalized printing.

When respondents that purchased these applications were asked how they expected their spending to change in 2021, the share of respondents that expected an increase exceeded the share that anticipated a decrease in nearly all categories.

Figure 3: Anticipated Change in Spending on Promotional Marketing Materials



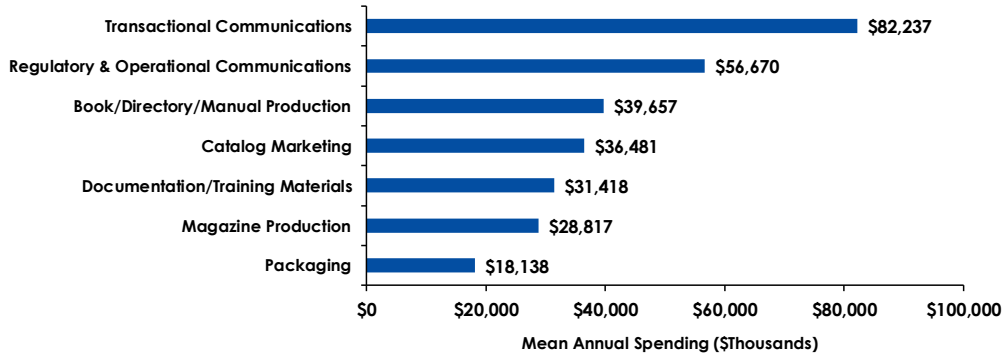
### Spending in Key Areas

The utilities market invests heavily in communication products. The Figure below outlines mean annual spending on various areas within the sector. Spending on the production of transactional communications was the highest at over \$8.2 billion.



Figure 4: Total Annual Spending on Key Marketing & Communication Areas

Approximately what was your company's/organization's total annual spending on the following last year?



N = Varies; Base: Respondents in the Utilities Industry responsible for printing services for these communications  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

Print makes up a significant portion of the utility market's communication spending. According to Keypoint Intelligence's research, utilities respondents who were responsible for creating, managing, or purchasing marketing/promotional collateral spent an average of nearly \$78,000 for individual print jobs.

### The Use of Communication Channels is Expanding

Utilities firms are expanding their use of communication tools to engage with audiences across media channels. Given this shift, it is only natural that most respondents anticipate a decline in their overall print spending. At the same time, however, print will remain an important component of communication spending as it offers high appeal and effectiveness when integrated with digital media channels in personalized, data-driven campaigns.

An increasing number of utilities firms are recognizing the value of using an integrated cross-media approach to reach customers and prospects. They are using a variety of media types that include print, online, social, conventional advertising, e-mail, and text messaging. Utility providers are also taking advantage of real-time interactive connections to build stronger relationships with their customers.

### Digital Printing Serves the Needs of the Utilities Market

Digital printing continues to gain ground in the utilities market. Most applications that are printed via offset today are poised for a transition to digital because they can benefit from personalization, short runs, and quick turnaround times. Applications in the utilities industry that are well-suited for digital printing include signage, brochures, marketing collateral, labels, packaging, direct mail, and catalogs.

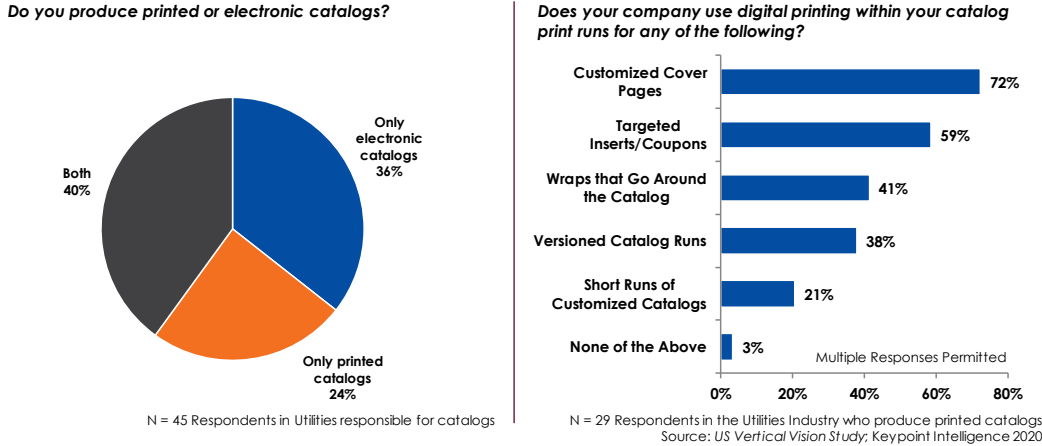
According to Keypoint Intelligence's research, nearly 65% of the respondents responsible for catalog production were printing at least some of their catalogs (meaning that they





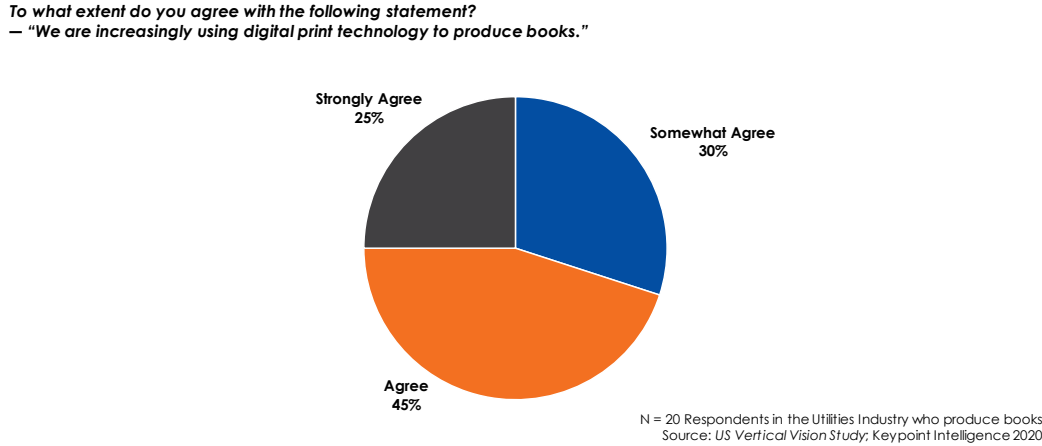
were't producing all their catalogs electronically). Of these, digital print technology was most commonly used for customized cover pages and targeted inserts/coupons.

Figure 5: Digital Printing of Catalogs in the Utilities Industry



Although only about 29% of respondents in the utilities industry were producing books, 70% of those that were agreed or strongly agreed that they were increasingly using digital technology for the printing of these books.

Figure 6: Digital Printing of Books in the Utilities Industry

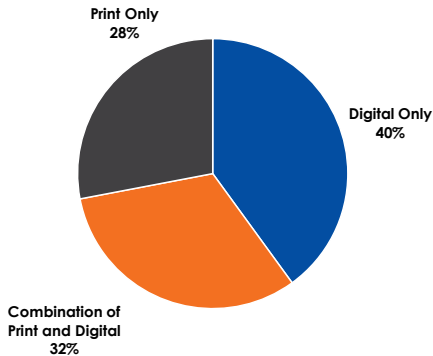


Although respondents in the utilities industry reported that 40% of bills and statements were sent to customers in digital format only, the flip side of this is that 60% of customers are still receiving at least some transactional communications in printed format. In addition, nearly three-quarters of respondents reported that the volume of printed or mailed transactional communications stayed the same or increased over the past three years.

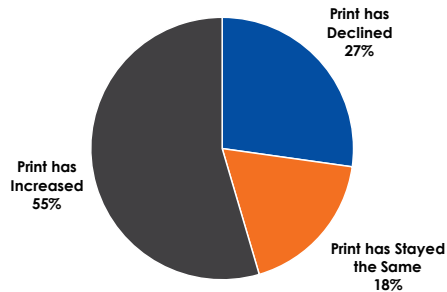


Figure 7: Delivery Format of Bills/Statements

What percentage of the bills/statements sent to customers are digital only, print only, or both?



How has the volume of printed/mailed transactional communications changed over the past 3 years?



N = 55 Respondents in the Utilities Industry with responsibility for transactional/regulatory communications Source: US Vertical Vision Study; Keypoint Intelligence 2020

As they strive to reduce costs, some businesses are attempting to accelerate the transition to paperless communications. The paperless option may be the default for new customers, or in some cases it may be the only option. Even so, Keypoint Intelligence's most recent transactional communications research suggests that this may not be the best long-term strategy. Over three-quarters of respondents to that survey wanted to decide which channels their providers used to communicate with them, and nearly half (47%) wanted printed versions of their bills and statements. In addition, 64% of respondents agreed that when they switched from one provider to another, it was often due to a bad experience—like a disregard of personal communication preferences!

In today's digital world, the key to success is actually a combination of print *and* digital communications. There is no "one size fits all" approach; it's about supplementing print with digital to have a stronger impact and enable the greatest customer experience possible. In a world where consumers have become inundated with digital communications, print can really stand out in a meaningful way while also driving consumers back to digital channels for increased engagement.

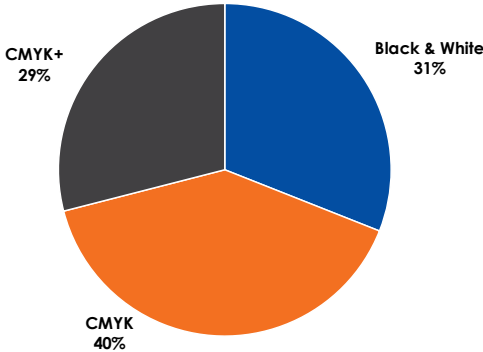
### CMYK and CMYK+

Color printing is playing an increasingly important role in marketing/promotional collateral in the utilities sector. Respondents reported that 40% of their print spend was devoted to standard Cyan, Magenta, Yellow, and Black (CMYK), and another 29% was dedicated to CMYK+ (i.e., the four standard process colors plus additional effects like metallics, spot colors, or glossy coatings).



Figure 8: Print Spend Devoted to Black & White vs. CMYK

How much of your print spend is devoted to the following?

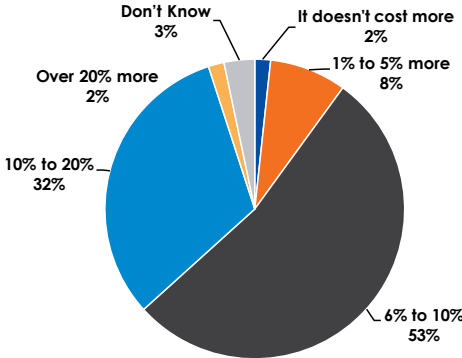


N = 61 Respondents in the Utilities Industry responsible for creation, management, or purchasing of marketing/promotional collateral  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

On average, utilities respondents report that CMYK+ jobs cost about 10% more than basic CMYK printing. Like many other industries, marketers within the utilities sector are finding that effects like metallic/fluorescent inks, white/clear coatings, or neons can bring extra flair and value to their printed communications.

Figure 9: Extra Cost for CMYK+

On average, how much extra do the jobs requiring CMYK+ cost in relation to standard CMYK?



N = 60 Respondents in the Utilities Industry who spend money on CMYK process color  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

### Revenue Opportunities for Printed Communications

The utilities market offers many opportunities for providers who offer digital printing supported by Internet-enabled workflows. Serving the sector requires a number of key staples, including the ability to offer personalization, improved management and ordering for communication materials, and integrated multi-channel communication workflows.

#### Personalized Print

With digital printing, utility companies can affordably produce shorter runs and on-demand production that eliminates the need for storing materials and the waste generated from out-of-date materials. In addition, digital printing enables utility companies

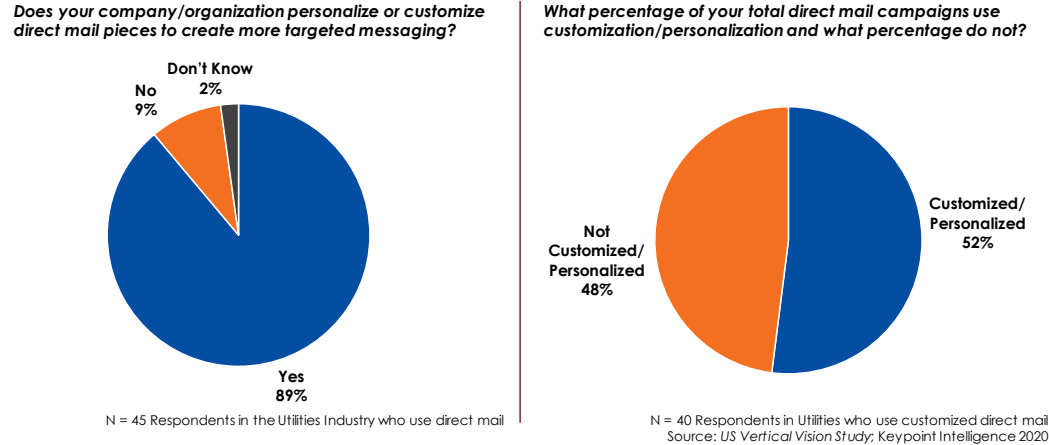


to highlight a customer's usage and personalize offers based on an individual customer's or prospect's needs and requirements.

Personalized printed documents can incorporate variable text and images to make the piece unique to each recipient. Variable data printing (VDP) solutions enable utilities firms to personalize statements, direct mail campaigns, newsletters, brochures, and more. Print providers that offer VDP can increase the value and customer benefits of utility companies' communication efforts through the delivery of relevant messages. Transactional documents are a key application that can benefit from data-driven personalized print. Adding personalized messaging increases the odds that these documents are going to be opened and read by utility customers.

Keypoint Intelligence's research confirms that nearly 90% of utilities respondents are using customization or personalization to make their direct mail messaging more targeted. Among those respondents that do create personalized direct mail, about 52% of campaigns are customized.

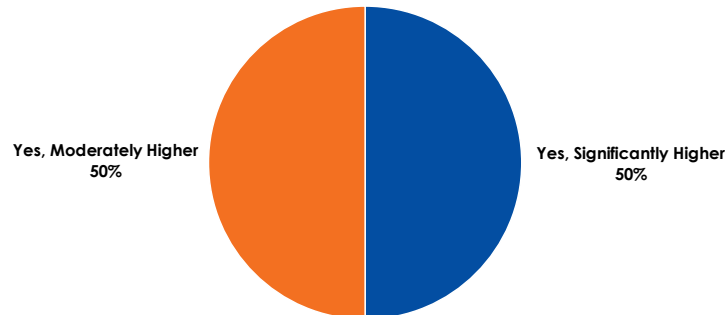
Figure 10: Personalized Direct Mail



Personalization of direct mail pieces can pay off dramatically for the utilities industry. To this point, half of utilities respondents reported significantly higher response rates on direct mail campaigns that incorporated customization, and the remaining half reported moderately higher response rates.

**Figure 11: Response Rates Associated with Personalized Direct Mail**

Does your company achieve higher response rates on direct mail campaigns that incorporate customization/personalization?



N = 40 Respondents in the Utilities Industry who use personalized direct mail  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

VDP enables PSPs to enhance the return on communication investments with its ability to enhance message relevance. Relevant communications drive response rates to marketing offers and communications that require an action. Organizations of all types need assistance with data-driven personalized print programs, and this creates an opportunity for external or in-house PSPs. To capitalize on this opportunity, PSPs must make smart investments in hardware and software products that power variable data. The ability to create relevant content is critical.

### **Online Print Ordering Improves Process Efficiency**

The ability to provide companies with online ordering tools to better manage quantities of materials, order as needed, and personalize print is an important service. -Commerce (also called Web-to-print) can bring many benefits to utilities firms. Businesses can use these systems to better control print costs, maintain brand management, and stop the distribution of outdated materials.

These online ordering portals enable users to:

- ◆ Upload print jobs
- ◆ Reprint standard items
- ◆ Create customized materials based on corporate-approved templates (i.e., mailers, business cards, signage, business stationery)
- ◆ Reduce administrative and sales time in securing orders
- ◆ Enhance brand control as proper uses of logos and formats are controlled
- ◆ Improve accounting as proper approvals and chargebacks pre-programmed into the system



*The benefits of Web-to-print include a reduction in administrative and sales time in securing orders, enhanced brand control (with the proper use of logos and formats), and improved accounting (because proper approvals and charge-backs are pre-programmed into the system).*

In addition, online print ordering and job management systems meet utility firms' needs to better manage and optimize their purchasing of communication products. Web-to-print systems provide utilities companies with an agile and scalable communication ordering processes that reduce costs from over-ordering of materials and assist in allocating dollars appropriately. Web-to-print systems offer the following benefits:

- ◆ A lower likelihood of producing ineffective materials
- ◆ A reduction in unnecessary inventory, thus increasing working capital
- ◆ The elimination of obsolete business processes
- ◆ Increased production and faster responsiveness to market demand
- ◆ Stronger brand control

Based on industry trends and the results of Keypoint Intelligence's research, the message is clear—print providers that are serving the utilities market must offer Web-to-print options if they hope to remain competitive.

### **The Customer Experience Comes Front and Center**

The concept of the customer experience is not new—businesses have been formulating strategies on how to keep clients engaged and happy for decades. From mapping the customer journey to learning the psychology of the point of sale to identifying the importance of retention, this process is already well-understood.

It has long been established that existing customers are generally much more profitable for businesses than new customers. Data from Bain & Company, in coordination with Harvard Business School, showed that even a 5% increase in customer retention can transform into a profit increase ranging from 25% to 95%. It is also cheaper to rely on returning customers. Capturing the attention of any audience is difficult. There are countless channels of communication, and the average customer is bombarded by marketing messages and advertising campaigns. According to information compiled by Invesp, it costs roughly five times as much to entice a new customer as it does to retain an existing one.

Furthermore, and not surprisingly, it is easier to sell to existing customers. The first step—convincing a customer to buy from a brand—has already been completed, so marketers need only convince that customer to keep buying. This should be easy as long as the customer was satisfied with his or her experience. It is no surprise that the customer



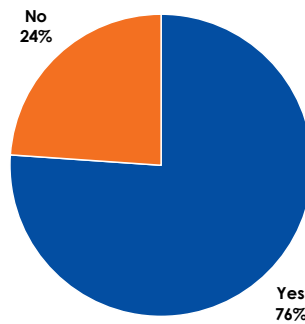
experience is front and center in the minds of many utilities firms—customers who have positive experiences are typically more loyal and will often spend more with providers they like. Meanwhile, consumers that feel disrespected or unheard are more likely to defect to a competitor. It is more important than ever for providers to deliver a positive experience because the customer experience is intimately tied to engagement and loyalty.

**Online Sales Continue to Accelerate**

Consumers and businesses have become more comfortable with online purchasing than ever before. As a result, it should come as little surprise that over three-quarters of utilities firms that responded to Keypoint Intelligence’s survey are currently shipping directly to customers as a result of purchases made on their websites or e-commerce platforms.

**Figure 12: Shipping Directly to Consumers or Businesses**

*Does your company ship products/packages directly to consumers or businesses as a result of purchases made on your website or e-commerce platform?*



N = 67 Respondents in the Utilities Industry responsible for printing services  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

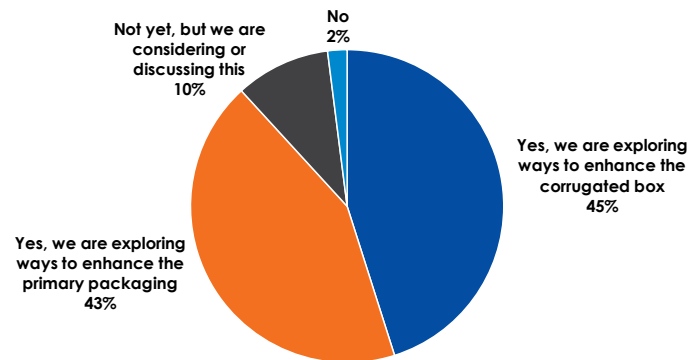
Businesses across all verticals are working to deepen their connections with clients and consumers, and ongoing improvements to digital technology now enable an enhanced “unboxing experience” with packaging. Digital printing makes it possible to print more colors or embellishments on the increased number of boxes that are being delivered to homes and businesses. Packages can now be customized and personalized, and some are incorporating spot varnish, digital foils, or raised textures for more appeal. Businesses can also include more personalized printed materials within these packages. Brand owners are working to create the best experience in all interactions with customers, and this includes the delivery of packages.

Of the utilities firms that were shipping products/packages directly to customers, over 85% were already taking steps to enhance the unboxing experience in some regard. Another 10% were discussing or considering the possibility.



**Figure 13: Enhancing the Unboxing Experience**

*With more people and businesses ordering online, is your company exploring ways to enhance the “unboxing experience”?*



N = 51 Respondents in the Utilities Industry who ship products or packages directly to customers  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

Now that consumers are engaging with more channels than ever before, utilities firms have even less of an opportunity to connect with their customers face-to-face—but this doesn't mean they still can't stay connected! Packaging is yet another medium that can be used to establish and maintain a relationship between businesses and their customers.

The rise of e-commerce ties back to that ever-important customer experience. Packaging is just another touchpoint that businesses can—and should—use to stay connected with their customers.

### **Cross-Media Marketing**

Utilities firms understand the need to blend media types in today's multi-channel world. No single channel—print or digital—is sufficient for an effective, relevant, and engaging marketing campaign.

Cross-media marketing can be applied within the utilities industry in a variety of ways:

- e-Mail Campaigns:** Typically working with the marketing department of the organization, print shops are moving into helping with e-mail campaigns. In the utilities market, these campaigns might originate when the corporation is trying to reach out to existing customers and/or prospects. They might be targeted campaigns that are designed to appeal to a specific subset of consumers, such as new homeowners. Offering this service involves building a list of whom the communication is going to; having an attractive, well-thought-out message; and creating an effective and clear call to action.
- Personalized URLs (pURLs):** pURLs are personalized websites that are customized to the person visiting them. They are often used with direct mail campaigns to increase response rates or gather information on prospective customers. First, a printed piece encourages recipients to log on to the PURL. When the recipient does so, the information from the database is used to tailor the Web page





experience to that person. Moreover, once the individual logs in, the website can track the respondent's activities and continue to tailor the information based on his/her behavior. This information can also be used to better customize any future communications.

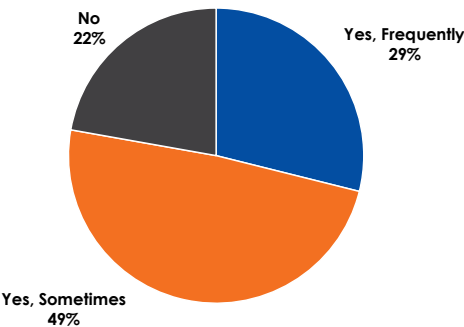
- **Linking Print and Mobile:** Smartphones are now ubiquitous, and most people always carry these devices with them. Printed mobile barcodes that can be read by smartphones are serving as bridges that connect print to the online world, with the idea being that the two channels work better together. Print serves as the trigger for capturing initial attention, and the code takes viewers to a Web page to view or provide additional information. Mobile barcodes can be used to store all kinds of data, including URLs. The Quick Response (QR) code is a very popular type of mobile code for marketing in sales materials. In the utilities industry, the codes may be included in communications that direct customers to an instructional video on a new offering or tips on how to reduce energy consumption.

### Leveraging Print in a Digital World

On a global basis, utilities firms are expanding their use of communication tools to engage with audiences across an ever-widening array of channels. Utilities respondents approximated that their spending split was 56% digital media versus 44% traditional media. Among firms that use direct mail, over three-quarters were frequently or sometimes coordinating their direct mail campaigns with e-mail or other digital media.

**Figure 14: Combining Direct Mail with Digital Media**

*Are direct mail campaigns coordinated with e-mail or other digital media campaigns?*



N = 45 Respondents in the Utilities Industry who use direct mail  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

Communication decision-makers in the utilities industry are investing in areas that enable the combination of print with digital media channels to create personalized, data-driven, cross-channel campaigns.



## Selling to the Utilities Market

Effectively selling to the utilities market starts with understanding the industry and its dynamics. Assessing the competitive landscape should be an ongoing practice. Other important steps include:

- ◆ Analyzing the utility companies you currently serve or those you want to target to grow share
- ◆ Identifying key decision-makers
- ◆ Understanding buying rules
- ◆ Communicating with customers via their preferred channels
- ◆ Strengthening customer relationships
- ◆ Developing prospecting strategies that yield results

The utilities industry presents excellent opportunities for PSPs who can produce high-quality, customized and personalized marketing collateral. Utilities firms are seeking partners that can help them maximize their customer engagement efforts.

## Evaluate Your Current Customer Base

The best way to grow your business in the utility industry is by increasing sales with the customers you already have. If you currently serve utility providers, you have the opportunity to sell them more and expand the types of services you offer. Start by asking yourself the following questions:

- ◆ Who are our utility customers?
- ◆ What do they buy from us and why?
- ◆ Which real utility customers are the most profitable? What do we sell to them?
- ◆ What are the job titles of our key contacts? Are they decision-makers or acting on behalf of decision-makers?
- ◆ Can we sell more to these customers?

A key sales success factor is aligning your marketing and sales messaging with customer needs. Answering the aforementioned questions will help you assess your strengths and weaknesses in selling to utility providers.

Another reason to evaluate your current customer base is that strong product offerings and client relationships are built on knowing and understanding customers. Taking what you know about current utility customers and converting that information into customer profiles or fact sheets can institutionalize customer knowledge, and arm sales staff with



customer reference briefs. Profiles should include a history of the client's company and capture salient data such as company principals, key account stakeholders, staff with budget authority, number of employees, products/services offered, number of locations, and annual sales.

### **Identify New Opportunities**

Utility companies usually provide a commodity or service that is considered vital to the general public. To prevent price gouging and encourage widespread access, the government has granted individual utilities certain monopoly rights, accompanied by the right to regulate price as well as service terms and conditions. With the increasing deregulation of the utility industry, many customers now have more choice in selecting providers. As a result, utility companies must truly understand their customers' needs in terms of price, product offering, and customer service.

The Internet is a great resource for identifying companies you want to do business with and pinpointing opportunities. Visiting utilities websites or following them on social media can provide useful insight on possible opportunities. A utility company's website often includes contact information, purchasing requirements, service notifications, tips on conservation, news on technology investments and direction, and insight on strengths or weaknesses. Alternatively, a Facebook page may offer insights into the culture of the firm and its staff.

### **Determine Buyer Needs**

Successfully selling work to communication decision-makers in utility firms requires offering services that meet demands and solve problems. Most utility companies have a broad mix of criteria when it comes to selecting a print services vendor, including value, ability to meet deadlines, quality of print output, a broad range of services, and expert advice. Many utility providers also value services like mailing, fulfillment, website development, and mobile marketing. Offering a wide range of high-value services can help foster loyalty.

### **Pinpoint Decision-Makers**

Another important step in selling to utility companies is determining the right sales contacts. This involves identifying the units of an organization that purchase communications and the decision-makers with the authority and funds to buy. It's also important to identify and target buyers. The job titles of individuals with purchasing authority in the utilities industry can be quite varied, but some promising titles include:

- ◆ Buyer of Print/Print Media
- ◆ Chief Technology Officer
- ◆ Controller



- ◆ Director of Administration/Human Resources
- ◆ Information Technology Director/Manager
- ◆ Marketing Director/Manager
- ◆ Print Services Manager
- ◆ President/Vice President

### **Understand Buying Practices**

Purchasing rules play a key role in the buying decisions made by utility companies. Procurement policies seek to leverage buyer power, control spending, and ensure that essential requirements (e.g., price, quality, and turnaround) are met. Understanding a customer's buying practices and guidelines helps in writing winning proposals.

While the procurement process may vary by company, there are three common steps in the procurement process that you should know:

1. **Request for Information (RFI)** gathers information to help decide which suppliers have the capabilities to meet job requirements. Often the first step in the process, it is used to gather information, determine next steps, and develop an RFP or RFQ.
2. **Request for Proposal (RFP)** presents preliminary requirements for the product or service, and may dictate to varying degrees the exact structure and format of the supplier's response.
3. **Request for Quotation (RFQ)** invites suppliers to bid on specific products or services.

Here are a few tips regarding the procurement process:

- ◆ RFQs and RFPs are sometimes used interchangeably, so it is useful to have a conversation with the person in charge of the bidding process to better understand proposal submissions.
- ◆ The selling cycle should start well before the RFP is issued, and it is important to develop and maintain relationships with key decision-makers before the work becomes a RFI, RFP, and RFQ.
- ◆ Providers that win bids are likely to have had input into the bid requirements. A relationship that allows you to offer input into the writing of the proposal gives you an advantage in the process.

You can often find out more about preferred supplier programs and purchasing rules on utility companies' websites.

### **Align Marketing Efforts to Customer Preferences**

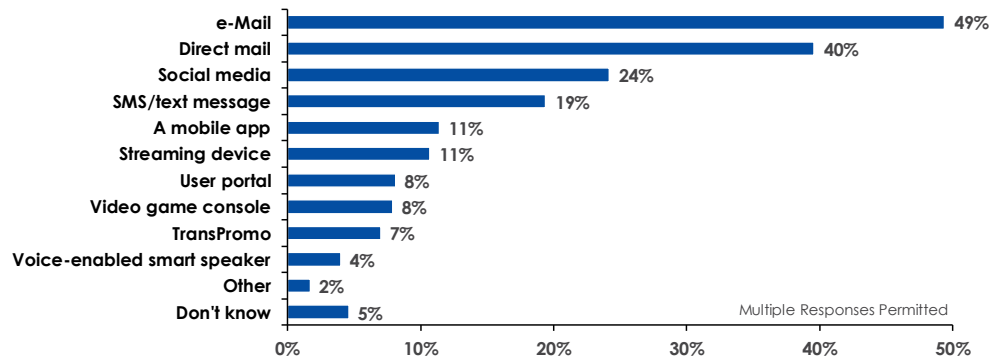
In addition to developing marketing and sales messages that resonate with customers, format is important. Any communication channels that are used should consider the



recipient's preferences. According to Keypoint Intelligence's marketing communications research, consumers' most preferred channels include e-mail, direct mail, and social media.

**Figure 15: Most Preferred Marketing Channels**

*Through which of the following channels would you MOST prefer to receive marketing communications?*



N = 1,550 Consumers in the US and Canada  
 Source: Annual State of Marketing Communications Consumer Survey, Keypoint Intelligence 2020

### **Build Stronger Customer Relationships**

Communication buyers in the utilities industry may consider their communication providers to be vendors or providers of self-service tools, rather than valuable partners. There is an opportunity for print providers to strength their relationships with utility companies and elevate their status to that of a trusted partner. One way to do this is to demonstrate industry knowledge and offer products and services that help customers overcome their unique challenges.

### **Learn About the Industry**

By monitoring the trends in the utilities industry, you will be better positioned to offer products and services that solve real customer problems. Keeping up with industry trends can be as simple as subscribing to e-newsletters or joining discussion groups to keep up on trends or find prospects. Customers want to do business with companies that understand their unique industry needs. Staying on top of industry trends can uncover new opportunities and help position your company as a knowledgeable and trusted advisor.

It is important to join the same associations and organizations as your customers. These groups provide a venue to learn about the industry and an opportunity to network with sales prospects. Industry organizations host education and networking events. Attending events gives you an insiders' view on the key challenges you can solve. In addition, speaking at industry events positions you as an expert. By simply getting involved, you can access key individuals that can feed the sales pipeline.



Networking is a powerful tool for building relationships that result in sales. It solidifies current customer relationships and drives prospecting effectiveness, as it provides access to a potential client. There are many benefits to networking, including:

- ◆ Staying connected with customers and contacts
- ◆ Expanding relationships in customer organizations
- ◆ Sharing knowledge, insight, and contacts
- ◆ Getting the help you need when you need it from people who can provide it
- ◆ Establishing relationships BEFORE you need them
- ◆ Positioning yourself as an expert
- ◆ Helping others

### **Achieving Success in the Utilities Market with Digital Printing**

Utilities firms use many types of communications to engage with customers. Although print is playing a supportive role in today's multi-channel world, this is true for all media channels. Adding ancillary services to offset declines in print revenues and better service to customers is the new equation for success in the utilities market.

The utilities industry offers solid opportunities for PSPs to grow business and digital printing volumes. Utility providers understand and are taking advantage of the digital printing's ability to print shorter runs and personalize communications. They are seeking print providers that can recommend products and services aligned with their unique needs today and in the future. They also demand proof that PSPs understand their market and can deliver on product and service claims. It is important to create sales and promotional materials that incorporate key industry trends and demonstrate your unique abilities to help utility companies drive revenues and improve efficiency. Developing those materials hinges on learning and understanding the industry.

## **PART 3: The Impact of COVID**

No discussion of this time in human history would be complete without mentioning the COVID-19 pandemic, which took the world by storm in early 2020. In the early days of the pandemic, few people knew what to expect and many were caught by surprise. Although utilities firms by their very nature are well-equipped to deal with emergencies, a global pandemic is a once-in-a-lifetime situation with far-reaching implications. The utilities industry continues to feel the effects of the ongoing pandemic, the economic downturn, and lingering uncertainty about what the future holds. This section of the report explores COVID's evolving role within the utilities sector.



## Key Industry Trends

### ***Crisis Management is Key***

The widespread nature of the COVID-19 pandemic forced some utilities firms to add increased flexibility to their business continuity capabilities. Even during a pandemic, utility services must remain dependable and consistent. Some utilities firms have been increasing their coordination efforts to accommodate the risks to their field workers.

### ***The Impact on the Workforce***

There is no question that COVID-19 has changed the way that people work. As we emerge from the pandemic, many companies will implement a “hybrid” workflow where employees are permitted to work where and how they prefer, because their responsibilities can easily be handled remotely. The utilities industry, however, faces a unique challenge—a large portion of its workforce is critical to day-to-day business operation and the reliable delivery of gas, power, and water.

Although cybersecurity is always top-of-mind for businesses in all industries, firms face additional vulnerabilities because employees require higher levels of remote access to core systems. Employees and managers might also be more susceptible to social engineering efforts during a global health crisis. Utilities firms should consider the following steps:

- ◆ Implement risk mitigation programs for employees who must work at a common worksite
- ◆ Adopt remote or flexible work arrangements for non-essential staff
- ◆ Increase automation to minimize close contact between employees
- ◆ Train employees to recognize phishing and e-mail scams
- ◆ Take actions to ensure that remote transmissions are kept secure

### ***Supply Chain Management Must Be Prioritized***

While regulated utilities are mandated to have access to adequate supplies of critical parts, components, equipment, and materials for emergencies, the utilities sector has encountered shortages due to the constrained production of supplies. In addition, the demand for power, gas, and water temporarily declined in the commercial and industrial sectors. Some customers also faced financial hardships and struggled to pay their bills. What's more, consumers have been spending more time at home than ever before, so they are naturally consuming more utilities resources than they were in the past. These issues have placed an additional strain on utilities providers.

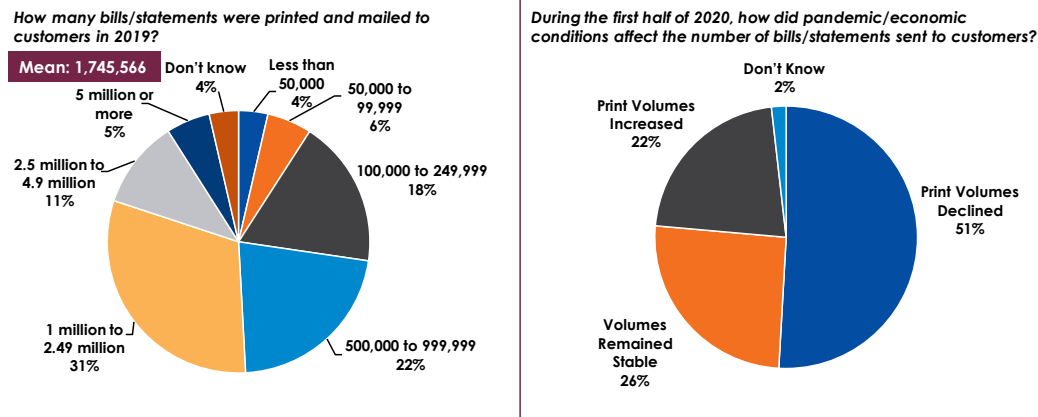


### Direct Mail Printed and Produced

#### Bills & Statements

On average, respondents in utilities firms printed and mailed about 1.7 million bills and statements to customers in 2019. Although the greatest percentage of these respondents saw a decline in their bill & statement volumes due to the arrival of COVID-19 and the subsequent economic downturn, nearly 22% reported that their print volumes increased.

Figure 16: Bills & Statements: The Impact of COVID



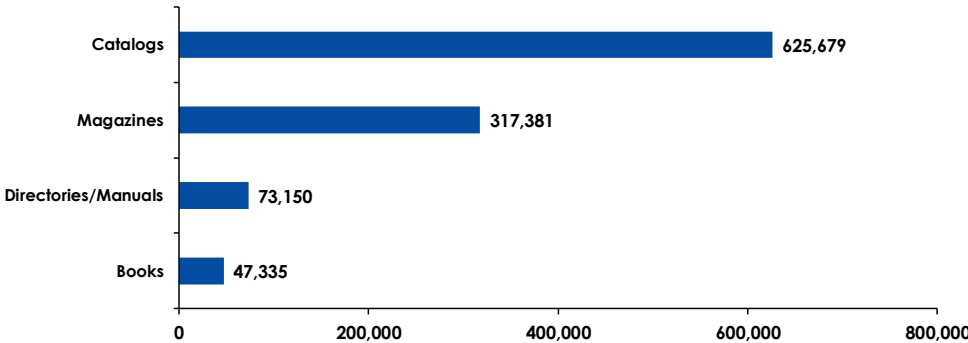
N = 55 Respondents in the Utilities Industry with responsibility for transactional/regulatory communications  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

#### Other Types of Direct Mail

The Figure below outlines the average number of other direct mail pieces that utilities firms reported printing/producing on an annual basis. The volume for catalogs was highest by a wide margin.

Figure 17: Direct Mail Pieces Produced Annually

On average, how many of the following did your business unit print/produce during 2019?



N = Varies; Base: Respondents in the Utilities Industry who print/produce these applications  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

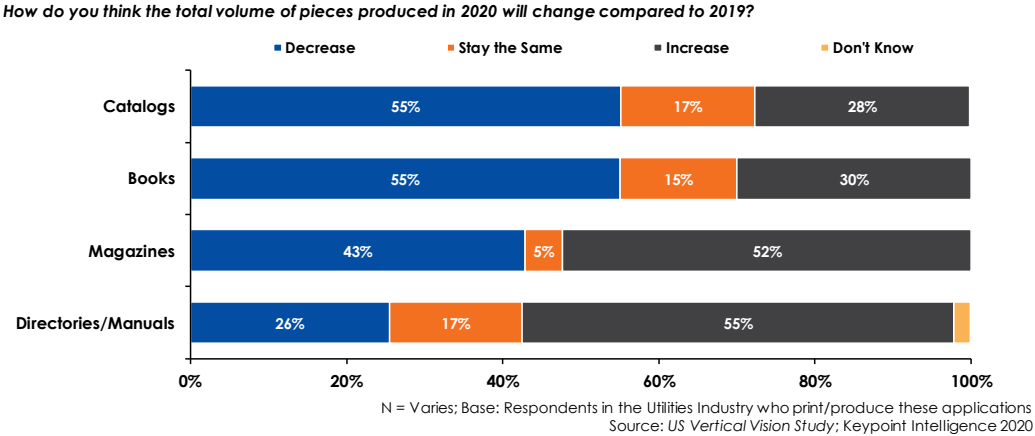
As would be expected, COVID-19 affected production volumes for all types of direct mail. This was especially the case for catalogs and books, where over half of utilities respondents expected their 2020 volumes to decline in relation to 2019. At the same time, however,





over half of respondents expected their production of magazines and directories/manuals to increase during this same timeframe.

Figure 18: Anticipated Change in Volume



While there is no denying that the pandemic had an impact on direct mail printing volumes in 2020, print will remain a vital part of the communications mix for quite some time. In fact, "digital overload" is actually positioning print for future marketing success. Savvy businesses have recognized this and are now supplementing their digital marketing messages with direct mail, postcards, catalogs, and other printed communications. This has proven quite effective for a very simple reason—in today's digital word, printed communications can cut through the clutter and get noticed.

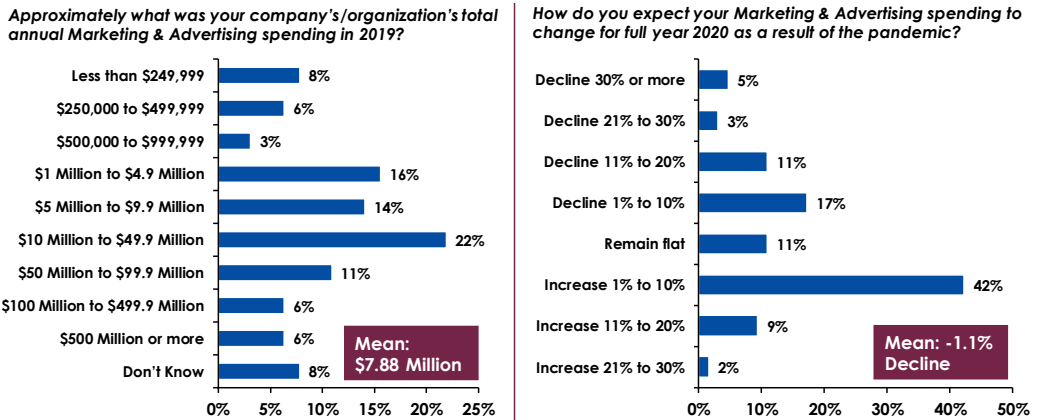
### Communication Spending Trends in Utilities

#### Marketing & Advertising Spend

During 2019—which was, of course, pre-COVID—utilities respondents reported spending an average of nearly \$7.9 million on marketing and advertising. Although the arrival of COVID-19 has a major impact on marketing and advertising spending in some sectors during 2020, utilities expenditures are expected to decline only slightly. Even during a pandemic, consumers and businesses still always need certain utilities to live their daily lives. Therefore, it makes sense that marketing and advertising spend will remain largely unchanged.



Figure 19: Marketing & Advertising Spend

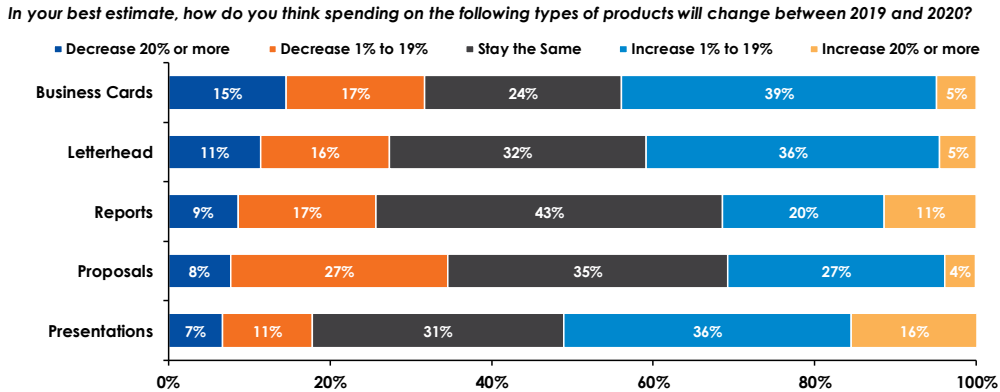


N = 64 Respondents in the Utilities Industry responsible for senior leadership, line-of-business management, marketing, or sales  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

Anticipated Change in Spending for Various Products

Respondents who were involved with printing services for general office documents were asked how they expected their spending on various products to change between 2019 and 2020. For all categories, the majority of respondents expected their spending to increase or stay the same.

Figure 20: Year-Over-Year Change in Spending

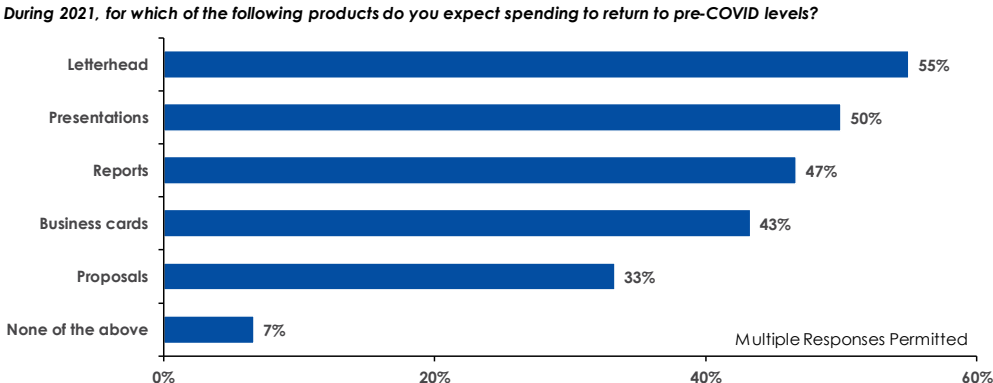


N = Varies; Base: Respondents in the Utilities Industry responsible for printing services for general office documents  
Source: US Vertical Vision Study; Keypoint Intelligence 2020

It is also encouraging that at least half of these same respondents expected their spending for letterhead and presentations to return to pre-COVID levels in 2021.



Figure 21: Expectations for Spending Returning to Pre-COVID Levels in 2021



N = 60 Respondents in the Utilities Industry responsible for printing services for general office documents  
Source: US Vertical Vision Study; Keypoint Intelligence 2020



## The Bottom Line

Attracting new customers, retaining existing ones, maintaining day-to-day operations, and becoming an active member of a community all require ongoing communication efforts. Print is and will remain an important component of the communications mix for utilities firms. Utilities providers are leveraging the benefits of digital printing—short run, high-quality, personalization, fast turnaround, just-in-time, efficiency—to establish relationships with customers and prospects, promote their offerings, improve the efficiency of internal operations, and increase their market share. They are also communicating with consumers across an ever-widening array of media channels. Growing sales and reducing costs are critical success factors in the utilities market, and digital printing is delivering results on both fronts. Savvy businesses are learning that print can be blended with other media technologies to deliver tailored offerings that encourage purchases and help foster loyalty.



## About Canon Solutions America, Inc.

Canon Solutions America, Inc. provides industry-leading enterprise, production, and large format printing solutions, supported by exceptional professional service offerings. Canon Solutions America, Inc. helps companies of all sizes discover ways to improve sustainability, increase efficiency, and control costs in conjunction with high volume, continuous feed, digital and traditional printing, and document management solutions. A wholly-owned subsidiary of Canon U.S.A., Inc., Canon Solutions America, Inc. is headquartered in Melville, NY and has sales and service locations across the US. For more information on Canon Solutions America, please visit [www.csa.canon.com](http://www.csa.canon.com).



## About thINK

thINK is an independent community of Canon Solutions America Production Print customers, solution partners, and print industry experts. Canon Solutions America is a proud executive sponsor. Led by some of the most successful inkjet service providers in the country, it provides a forum for members to network, gain knowledge, discuss common challenges, and share best practices. For more information, visit [www.thinkforum.com](http://www.thinkforum.com).



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