

# The Power of Print in a Multi-Media World

*Direct and Interactive Marketing Institute for Professors*


# Quad/Graphics 1971

- Pewaukee, WI
- 5 full-time, 2 part-time employees
- 1 press
- 1 saddle-stitcher
- 20,000 square feet

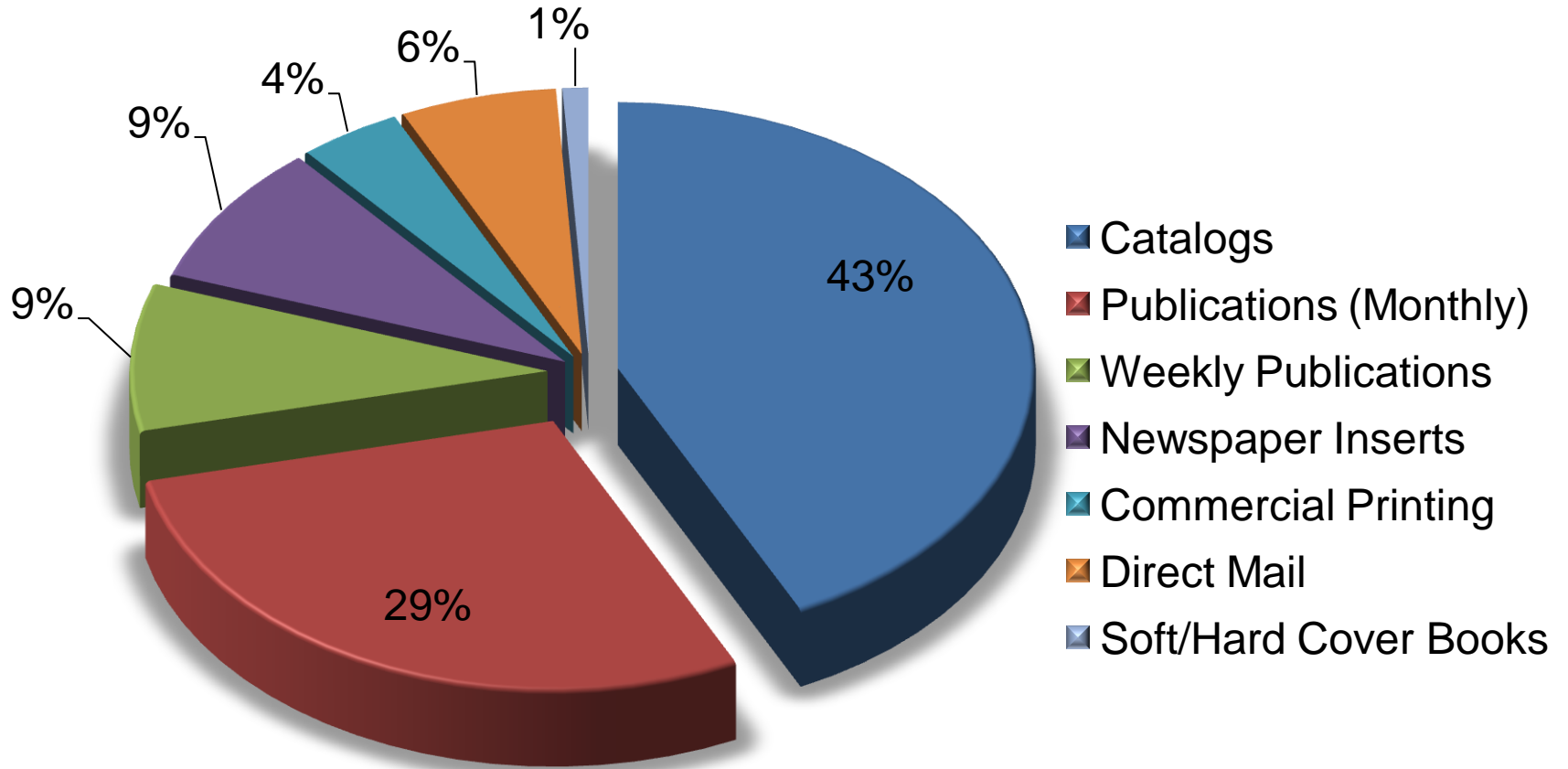


# Quad/Graphics

## 2009

- **Quad/Graphics**
  - 11 domestic plants
  - 4 international plants
    - 2 in Poland
    - 1 in Brazil
    - 1 in Argentina
  - 11,000 employees worldwide
  - \$2.2 billion in sales
  - Headquartered in Sussex, WI
- **QuadDirect**
  - 3 domestic plants
  - 600 employees
  - \$104 million in sales
  - Headquartered in Pewaukee, WI
- 
- A light yellow world map is overlaid on the text. Small blue dots are scattered across the map to indicate plant locations. There is a cluster of dots in North America, specifically in the United States. There are also dots in Europe (Poland), South America (Brazil and Argentina), and Asia.

# Product Mix 2009




# Our Manufacturing Platform




# Quad/Graphics' Approach to Business

- Private Ownership
  - Focus on clients and employees; long-term horizon
- Organic growth with limited acquisitions
  - Internal expansion, one client at a time
  - Greenfield plant and equipment
- Consistent management and flat organizational structure
- Continued, sustainable investment in PRINT
  - Cost management through modern platform
  - Vertical integration
  - Drive client's revenue line

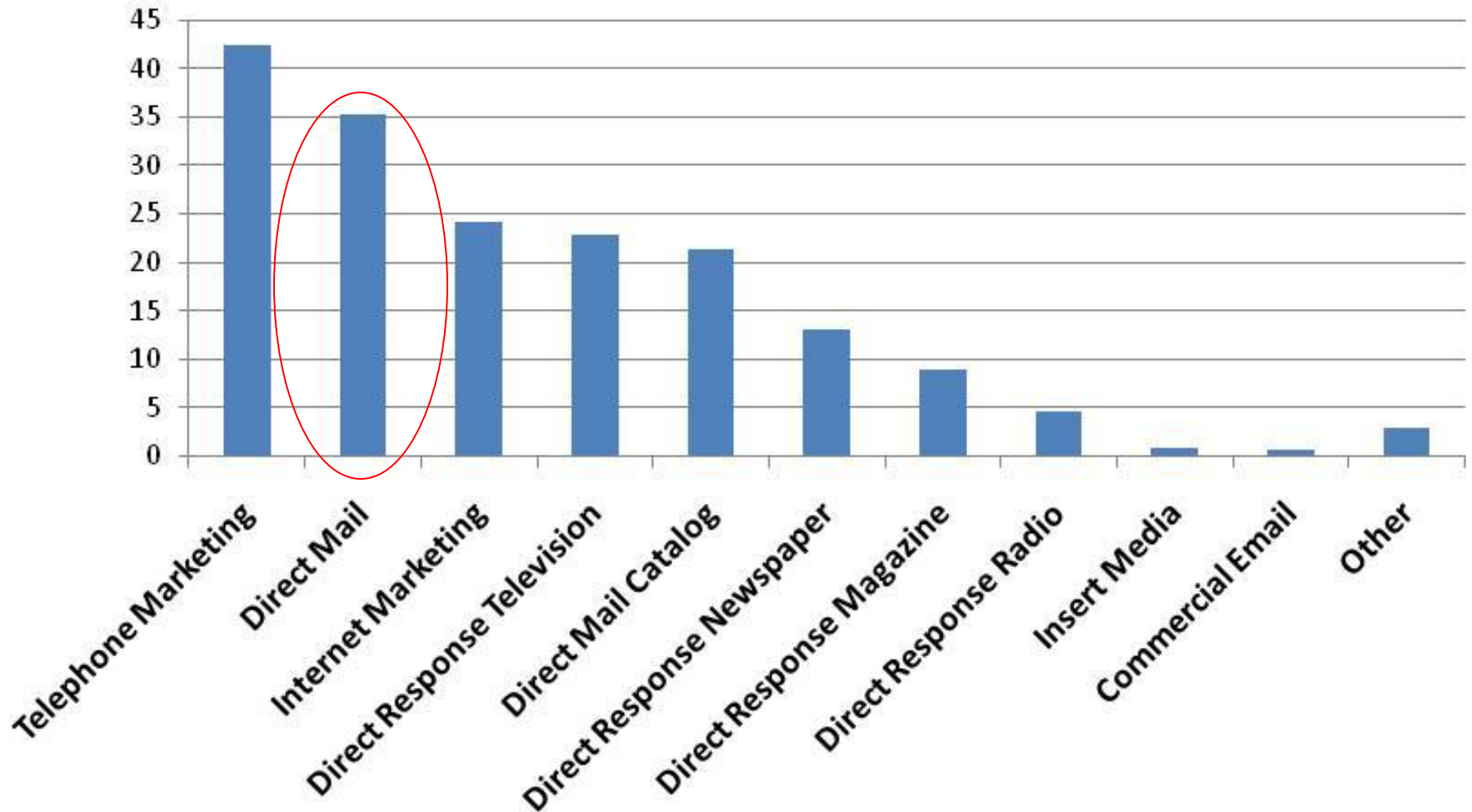


# State of the Industry



# Direct Marketing Expenditure by Medium

(In Billions)

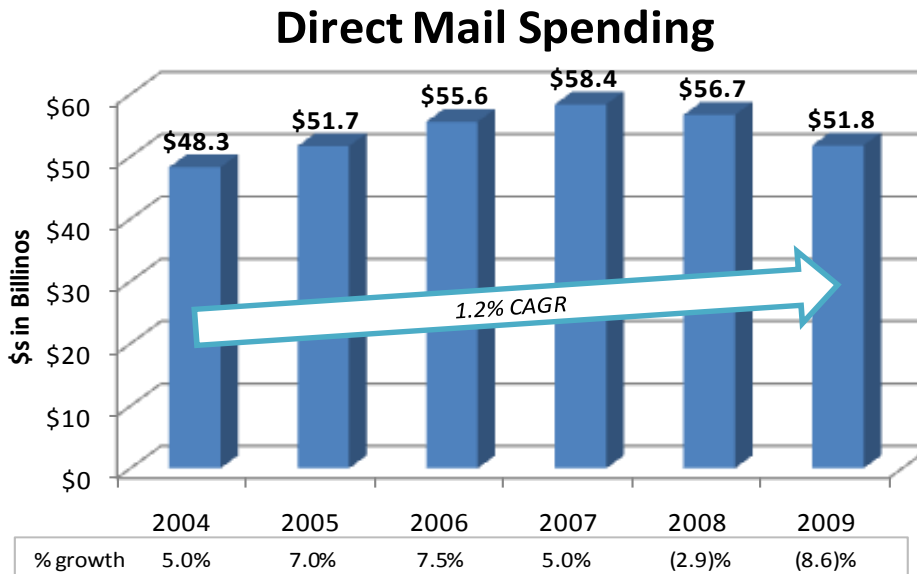




# Industry Highlights

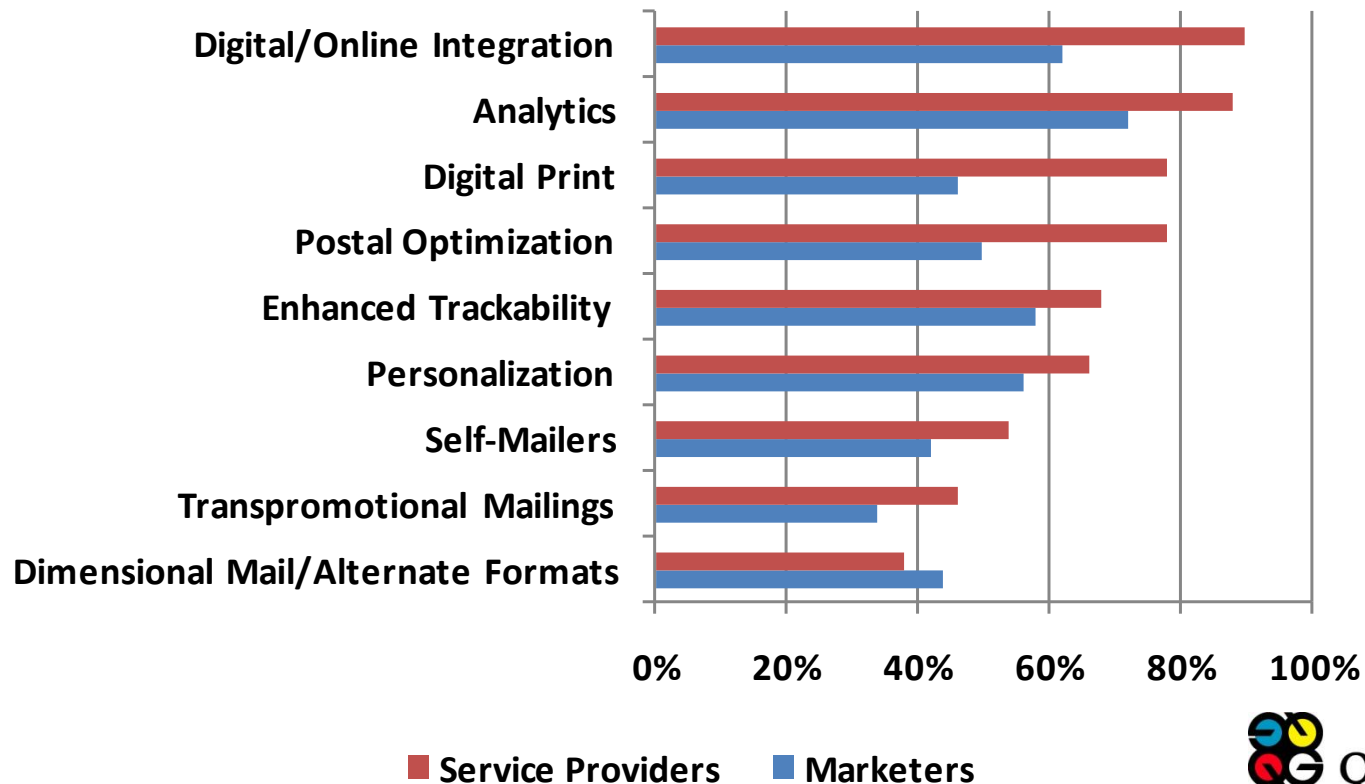
Projected industry growth:

- Over the next 4 years, likely to see a continued erosion in spend and volume, but **lack of effective substitutes in acquisition marketing will prevent a freefall**
- Winterberry Group projects Direct Mail advertising revenue will **decline to \$40B in 2013 from \$57B in 2008**, on a reduction in untargeted, high-volume campaigns
- Challenges include the timing of the current recession, **continued reduced volume of saturation mailing**, “Green,” Do Not Mail legislation, postal increases and lower-cost marketing vehicles



# Industry Highlights | Moving Forward

- According to a 2009 survey conducted by Winterberry Group, **both Service Providers and Marketers identified shifting trends in direct marketing needs and services**
- “Thinking about the coming year, which of the following processes, tools or priorities do you expect will grow in importance given your evolving marketing needs (or those of your clients)?”



# Saturated Mail to Targeted (1:1)

*Economic Conditions Forced the DM Industry to Resize Itself*

## Direct Mail

**Find**

Household Data

**Analytics & Models**

**Acquire**

Offers & Tactics

**Segmented Versions**

## Web / Retail

**Refine**

Features & Benefits

**Video & Search**

**Grow**

Close / Purchase

**Multi-Channel**

# Changing the Focus

- One partner from concept through ***multi-channel deployment***  
*Data, strategy, creative, workflow and deployment expertise promote efficiency, results.*

# Multi-Channel Deployment

## Case Study: Steinhafels



Mass marketing newspaper inserts



Targeted direct mail campaigns

# Steinhafels

- Database Management
- Data Hygiene Services
- List Acquisition
- Format Design
- Strategy & Research
- FSI
- Direct Mail



# 2008 Summary

Annual Pieces Mailed	2,891,391
Total Manufacturing & Paper Cost	\$333,418
Total Postage Paid	\$519,333
Total Manufacturing, Paper & Postage Paid	\$852,751
Total Sales Generated from Direct Mail (Match back)	\$39,152,988

**Average Return on Marketing Dollar** **\$45.91**

## New Customer Acquisition

2007	219,613	
2008	295,572	34.5%

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- Low-cost, **integrated solutions for data and print**  
*Innovative solutions decrease cost per response, reduce cycle time and optimize spend.*



# Integrated Solutions for Data and Print

## Case Study: Chadwicks

### Just-in-Time Data Application



Approximately 17% of the US population moves each year

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- Strongest, most advanced ***technology platform***  
*Production platform backed by a third party certified secure infrastructure across all plants.*

# Advanced Technology Platform

## Case Study: State Farm



Acquisition / Up sell



Retention Vehicle



Trigger Programs

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- ***Integrated workflow*** and CRM solutions  
*Broad experience delivering efficient solutions from customer insights to customer response.*

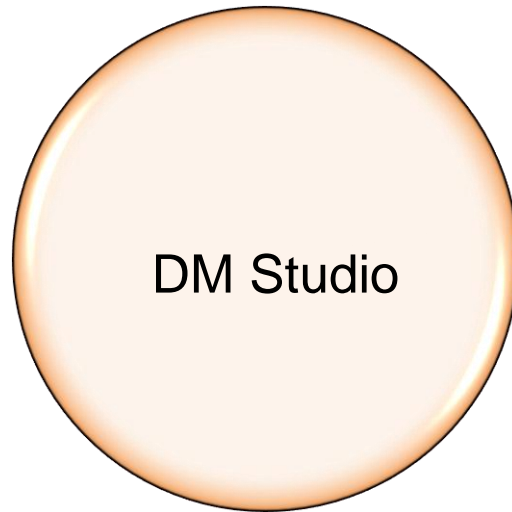


# Multi-Channel Solutions | Future State

## PURLS & Web Marketing



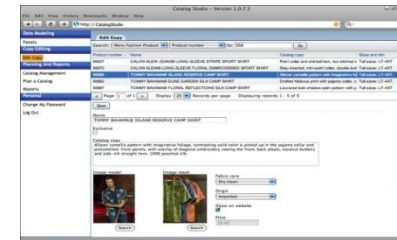
## Email Marketing



## Print Solutions



## Asset & Database Management



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- ***Industry-specific experience*** and customized solutions  
*Solutions for direct marketers in non-profit, retail, insurance, financial and other markets.*

# Industry Specific Experience

## Case Study: Performance Bicycle



- Goal: Boost sales in retail stores
- Removable incentive die-cut cards test, circulation ~240M.
- Pg. 2 placement w/ front cover callout
- 15% discount "For You" & "For A Friend" with expiration date

### Result:

- 14% lift in response over "No Card" control group
- 10% lift in Average Order
- 25% lift in \$ / Per Book
- Increase in new sales from "For a Friend"
- Estimated \$937 thousand increase in retail and \$147 thousand increase in direct sales.



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- **Industry-specific experience** and customized solutions  
*Solutions for direct marketers in non-profit, retail, insurance, financial and other markets.*
- **Leading distribution services** and tracking metrics  
*Largest mail pool volumes, competitive co-mail solutions and real-time delivery tracking tools.*

# Leading Distribution Services / Part I

## Case Study: Charter Communications

Letter mail dropping shipping with catalogs & magazines

QuadDirect	\$ .1853 / piece	90.6% SCF
Vendor "A"	\$ .1884 / piece	81.6% SCF

### QuadDirect

Postage	\$ .1853 / piece
Freight	\$ .0039 / piece
<b>Total</b>	<b>\$ .1892 / piece</b>

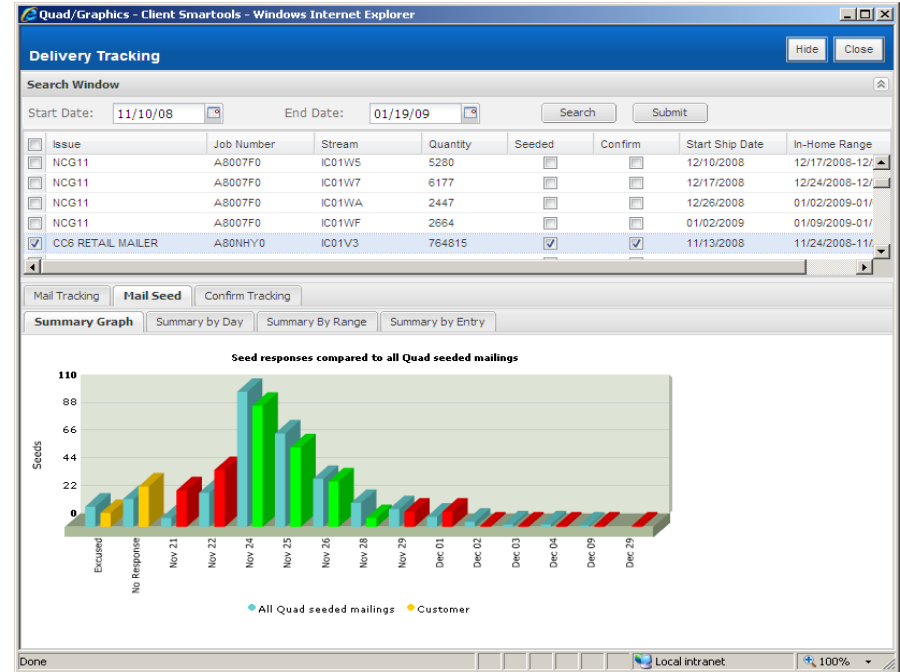
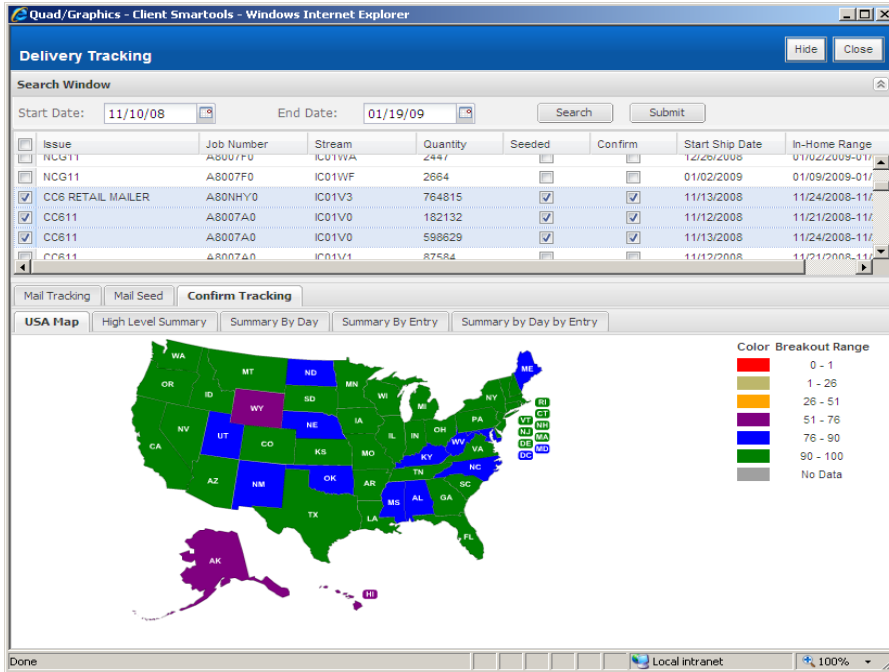
### Vendor "A"

Postage	\$ .1884 / piece
Freight	\$ .0054 / piece
<b>Total</b>	<b>\$ .1938 / piece</b>

**Difference of \$.0046 / piece or \$4.60/M**  
**Savings per mailing \$15,385**  
**Annual Savings of \$690,000**



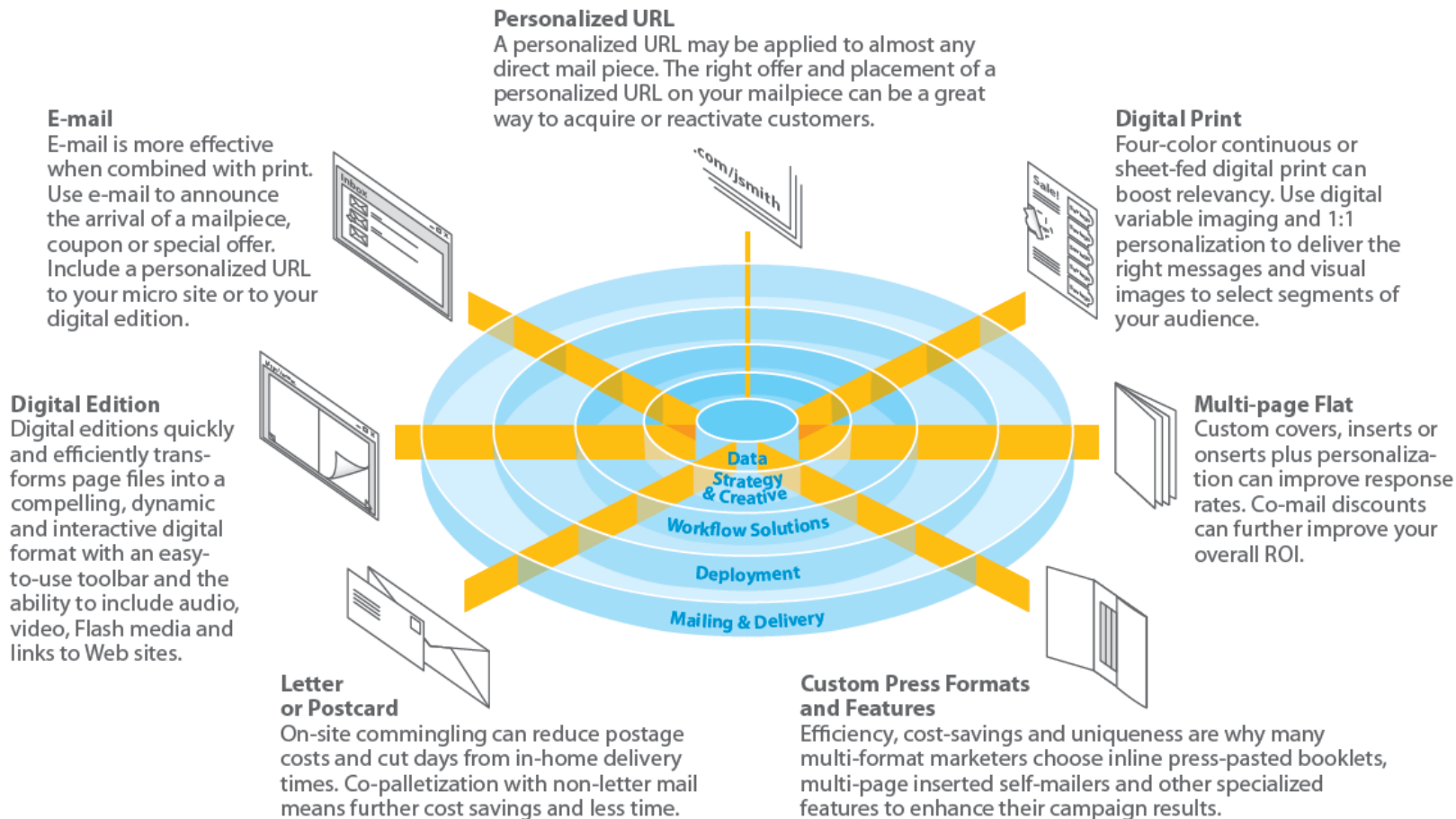
# Delivery & Seed Tracking



Market differentiator especially with commingled mail

# It's an "All of the Above World"

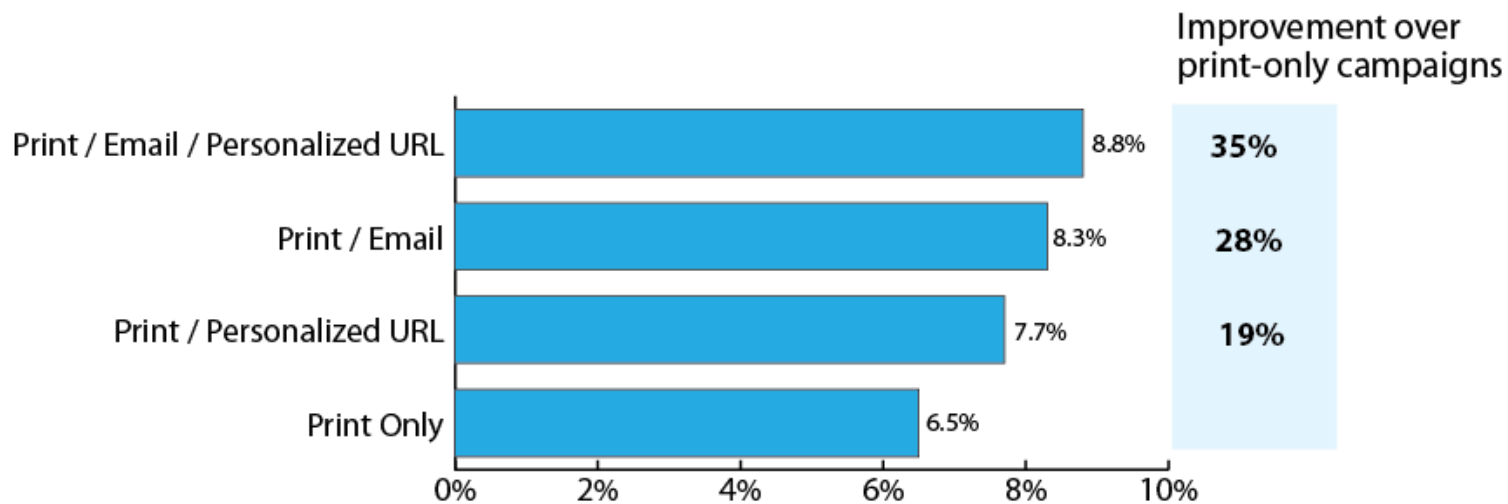
Coordinating multiple campaigns across multiple channels to produce truly integrated marketing communications ...



# Multi-Channel Marketing Results!

## More Channels = More Response

Average response rate of campaigns that use the following combinations of media channels

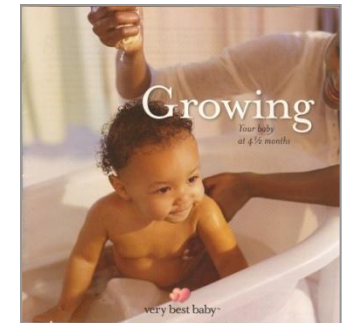
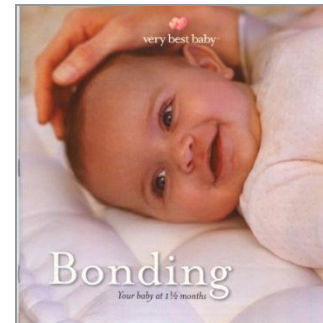
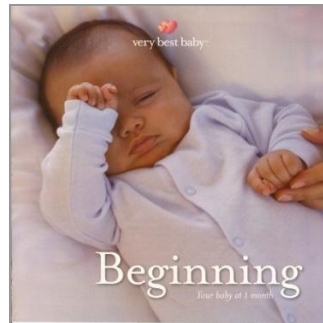
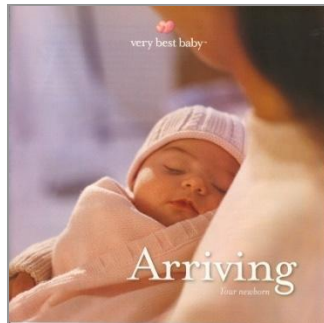
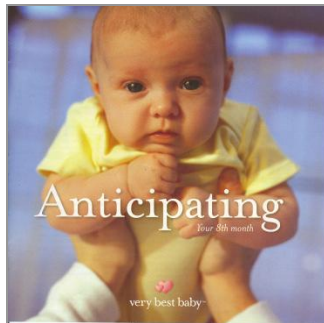


Source: Multi-Channel Communications Measurement & Benchmarking ... InfoTrends 2008 (N=217 marketers)

# Product Showcase



# Data + Personalization + Versioning = Success







# Cover Personalization

**goodneighbor**  
The magazine for State Farm customers

**PREMIERE ISSUE!** Essentials for your family, your life, your dreams

We already protect you when you're on the road. **WHAT ABOUT WHEN YOU'RE NOT?**

You rely on State Farm® to protect what's most important to you. And what could be more important than life? For life insurance, go to someone who's been there for you in the past. Your State Farm agent. They'll help get you the right policy for you and your family. After all, they were there when your "baby" was your car.

CALL OR VISIT YOUR STATE FARM AGENT TODAY:  
DAN WAGNER  
1251 899-7900  
DAN.WAGNER.PDK@STATEFARM.COM

LIKE A GOOD NEIGHBOR STATE FARM IS THERE!

statefarm.com

**INSIDE:**

- Jeff Burton NASCAR's Mr. Safety page 6
- Savings to Set You Free page 11
- 5 Simple Ways to Organize Finances page 20

Thanks for letting me serve you as your State Farm® Agent. Enjoy our new magazine, and call me for your insurance and financial services needs.  
**Dan Wagner**  
1251 899-7900

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Thanks for letting me serve you as your State Farm® Agent. Enjoy our new magazine, and call me for your insurance and financial services needs.  
**Ralph Serino**  
1251 899-7900

WELCOME

You are holding in your hands the premiere issue of State Farm's goodneighbor magazine, a new publication created to empower you to make your life healthier, safer and more secure.

This issue, for example, contains lots of great tips on everything from the latest auto safety features on the road to making on-line banking easier. On page 12, Jack's Farm shows it's a whole lot easier to work—and to spend—on a road trip with your pet. Jack's Farm also has a lot to say about the latest in home security, investment programs and much more.

So what does content mean to you? It's the confidence you get from the magazine that you're in good hands.

That's right. In this magazine, we always have your best interests in mind. State Farm is also committed to helping you make the most of the services we offer. So, whenever it makes sense, we'll include information on how to help you get the most out of your State Farm policy.

**Dan Wagner**  
1251 899-7900

statefarm.com

Like a good neighbor, we're here to help you. We'll help you get the most out of your State Farm policy. We'll help you get the most out of your State Farm policy.

**CONTENTS**

20 Spring 2011

**FEATURES**

- 6 Advice from the Fast Lane
- 11 Safe Driving Checklist
- 11 Know Your Number
- 15 What's Your Most Cherished Possession?
- 20 5 Ways to Get Organized

**DEPARTMENTS**

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- 2 The Neighborhood
- 22 Safety Net
- 24 My Story

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**HELP WITH RETIREMENT PLANNING IS JUST A SHORT DRIVE AWAY.**

Retirement may be closer than it seems. But help with planning for it is even closer. Get started by calling me today.

**Dan Wagner**  
322 Ruhl Road S  
Ballston Lake, NY 12019-1030  
(518) 899-7900  
dan.wagner.pdk7@statefarm.com

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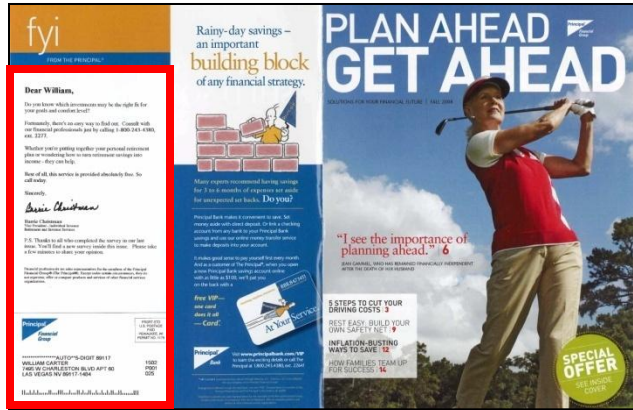
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**Ralph Serino**  
868 Route 146  
Clifton Park, NY 12065-3818  
(518) 371-2380  
ralph.serino.buc@statefarm.com

statefarm.com

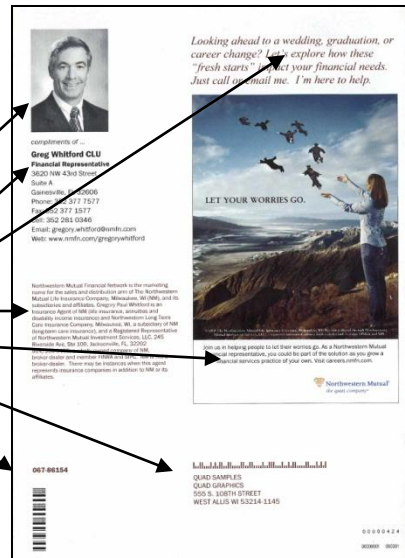
LIKE A GOOD NEIGHBOR STATE FARM IS THERE!

# Financial Loyalty Programs



↑ Agent Personalization

Agent Personalization and Targeted Offers



Variable Four Color Photos Integrated into Static Printing

# Self-Mailer



Product of Press with multiple points of personalization

# Staggered Pages

**Joel,**  
use up to \$2,445.77 available through your Dell Preferred Account™, and enjoy these huge savings on hot systems and electronics when you use the enclosed coupon codes.

**15% OFF** SELECT ELECTRONICS\*  
**UP TO \$300 OFF** ~~SELECT INSPIRON™ PCs†~~  
**UP TO \$250 OFF** SELECT XPS™ PCs†  
**CUTTING-EDGE**

**ORDER NOW AND SAVE!  
DELL.COM/EXCLUSIVE OR 1-800-847-8151.  
OFFERS VALID THROUGH 5/10/08.**

# Inkjet Coding

Each four page insert has ink jet codes



# Closed End Press Packages



- Alternative to traditional paper wrap
- All components must be same height
- Personalization 240 dpi

# High Definition Personalization





# Targeting Gender & Product Affinity

**Link to the things you love to win on eBay!** SPRING/SUMMER 2007

**BlackBerry**

**Link to the things you love to win on eBay!** SPRING/SUMMER 2007

**Courtney,**  
New picks—just for you!

1. Throwback Jersey  
AVG PRICE SOLD \$40.39
2. Bobblehead  
AVG PRICE SOLD \$11.89
3. MLB Tickets  
Bid now before it's gone!
4. Concert T-Shirt  
AVG PRICE SOLD \$17.76
5. PCGS Coin  
Bid now before it's gone!
6. Game Used  
Bid now before it's gone!
7. Ray-Ban Sunglasses  
AVG PRICE SOLD \$51.45
8. Retro Clock  
Bid now before it's gone!
9. Weber Grill  
AVG PRICE SOLD \$388.98
10. iPod Shuffle  
AVG PRICE SOLD \$63.83

**Elias,**  
New picks—just for you!

1. BlackBerry Pearl  
AVG PRICE SOLD \$261.43
2. Motorola Bluetooth  
AVG PRICE SOLD \$27.19
3. iPod Shuffle  
AVG PRICE SOLD \$63.83
4. Bose Headphones  
AVG PRICE SOLD \$227.00
5. Dell XPS  
AVG PRICE SOLD \$1,639.69
6. Canon EOS Digital  
AVG PRICE SOLD \$367.26
7. Sony PlayStation 3  
Bid now before it's gone!
8. TiVo Series 2  
AVG PRICE SOLD \$90.62
9. Nike SasQuatch  
AVG PRICE SOLD \$168.75
10. Weber Grill  
AVG PRICE SOLD \$388.98

**Barb,**  
New picks—just for you!

1. Clutch Wallet  
AVG PRICE SOLD \$50.78
2. Havaianas  
AVG PRICE SOLD \$23.42
3. Designer Bikini  
Bid now before it's gone!
4. Wrap Dress  
AVG PRICE SOLD \$50.31
5. Silver Hoops  
AVG PRICE SOLD \$13.84
6. Tunic  
AVG PRICE SOLD \$32.11
7. iPod Shuffle  
AVG PRICE SOLD \$63.83
8. Tourmaline T3  
AVG PRICE SOLD \$107.77
9. Vera Wang Princess  
AVG PRICE SOLD \$31.54
10. Garden Tools  
Bid now before it's gone!

Whatever it is... you can get it on eBay

Whatever it is... you can get it on eBay

Whatever it is... you can get it on eBay

Presorted Standard U.S. Postage PAID EBAY

Presorted Standard U.S. Postage PAID EBAY

Presorted Standard U.S. Postage PAID EBAY

0003 P143 120 566

0003 P143 182 584

\*\*\*\*\*ECRL0T 0289A\*\*R-004

Courtney Brown  
129 Running Bear Ct.  
Front Royal VA 22630-9047

\*\*\*\*\*ECRL0T 0130A\*\*R-010

Barb Franke  
402 Wallman Way  
Stevensville MD 21666-2632





# Variable Data Added to Match Customer

## AMAZING DEALS

for Patricia Leag

### 2004 Focus

0.0% financing for up to 60 months\*  
or \$2,500 Customer Cash back\*\*



### 2004 Explorer

0.0% financing for up to 60 months\*  
or \$3,000 Customer Cash back\*\*



## THEY'RE JUST AUTO PARTS. DOES IT MAKE A DIFFERENCE WHAT BRAND THEY ARE? DOES IT MATTER WHO INSTALLS THEM? WE THINK SO.

That's why our Dealerships use genuine parts, engineered specifically for your vehicle and installed by the factory-trained technicians who know it best.

<p style="text-align: center;"><b>4 tires for \$99</b> <b>PLUS, We'll beat your best deal on name-brand tires we sell, plus a 30-day price guarantee!</b></p> <p style="font-size: small;">Mounting, balancing and taxes extra. Offer valid on select models. Requires presentation of competitor's current price on the same brand tires sold by Dealership within 30 days of purchase. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>	<p style="text-align: center;"><b>The Works \$34<sup>99</sup></b> <b>Let our factory-trained technicians perform a thorough inspection of your vehicle, and more.</b></p> <p style="font-size: small;">Genuine Motorcraft® oil and filter change • Rotate and inspect four tires • Inspect brake system • Test battery • Check air and cabin air filters • Check belts and hoses • Top off all fluids • Up to five quarts of genuine Motorcraft® oil. Taxes and disposal vehicles extra. Includes hazardous waste disposal. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>	<p style="text-align: center;"><b>\$79<sup>99</sup> each</b> <b>Goodyear Wrangler RT/S P235/75R15</b> Replacement tire for select Explorer/Sport/Sport Trac, Ranger, and Mountaineer models.</p> <p style="text-align: center;"><b>\$94<sup>99</sup> each</b> <b>Michelin Symmetry P225/60R16</b> Replacement tire for select Crown/Victoria, Lincoln Town Car and Grand Marquis models.</p> <p style="font-size: x-small;">Mounting, balancing and taxes extra. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>
<p style="text-align: center;"><b>\$29.95</b> <b>ENGINE TUNE-UP SPECIAL</b></p> <p style="font-size: x-small;">4-cylinder \$29.95, 6-cylinder \$39.99, 8-cylinder \$49.99. Ford, Lincoln and Mercury vehicles and light trucks only. Some models additional. See Advisor for details. Expires 12/31/04. <b>SEE DEALER</b></p>	<p style="text-align: center;"><b>Free</b> <b>brake inspection</b></p> <p style="font-size: x-small;">Inspect brake friction material, caliper operation, rotors, drums, hoses and connections. Inspect parking brake for damage and proper operation. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>	<p style="text-align: center;"><b>Free</b> <b>battery test</b></p> <p style="font-size: x-small;">Visually inspect and test battery using Rotunda Micro-ARC tester. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>
<p style="text-align: center;"><b>\$29.95</b> <b>AC system check</b></p> <p style="font-size: x-small;">Includes performance test, leak inspection and check of belts and hoses. Refrigerant extra. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>	<p style="text-align: center;"><b>\$39.95</b> <b>cooling systems service</b></p> <p style="font-size: x-small;">Inspect radiator for leaks. Check hoses, clamps and belts. Pressure test system for leaks. Drain and refill radiator. Includes up to one gallon of coolant. Discounted flat extra if applicable. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>	<p style="text-align: center;"><b>\$59.95</b> <b>automatic transmission service</b></p> <p style="font-size: x-small;">Includes up to five quarts of automatic transmission/transfer case fluid. Additional fluid extra. Inspect and lubricate linkage and controls (where applicable). Roadtest. Offer valid on most vehicles. Includes hazardous waste disposal. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>
<p style="text-align: center;"><b>\$24.95</b> <b>two-wheel alignment</b></p> <p style="font-size: x-small;">Check and adjust camber, toe-in. Additional parts and labor may be required on some vehicles. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>	<p style="text-align: center;"><b>\$9.95</b> <b>oil and filter change</b></p> <p style="font-size: x-small;">Up to five quarts of Motorcraft® oil. Taxes and disposal vehicles extra. Includes hazardous waste disposal. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>	<p style="text-align: center;"><b>\$24.95</b> <b>two-wheel alignment</b></p> <p style="font-size: x-small;">Check and adjust camber, toe-in. Additional parts and labor may be required on some vehicles. See Service Advisor for details. Offer valid with coupon. Expires 12/31/04. <b>SEE DEALER</b></p>

Genuine Parts, Genuine Service, Genuine Peace of Mind.

(center spread: 6-page gate)

# 4/4 Pre-Printed Shell

AT&T U-verse

November 2009

# U-verse guide

ENTERTAINMENT MAGAZINE

Check out these November Video On Demand titles.

If it's movies, music entertainment or sports you're looking for, we have it all for you.

U-press

Here are a few of our top movie picks for November. To order, simply press VIDEO ON DEMAND on your remote control, then choose. It's that easy.

- All About: An American Girl (2) Available Now
- Love Man (TV-14) Available Nov. 10
- The Incredible Hulk (TV-14) Available Nov. 10

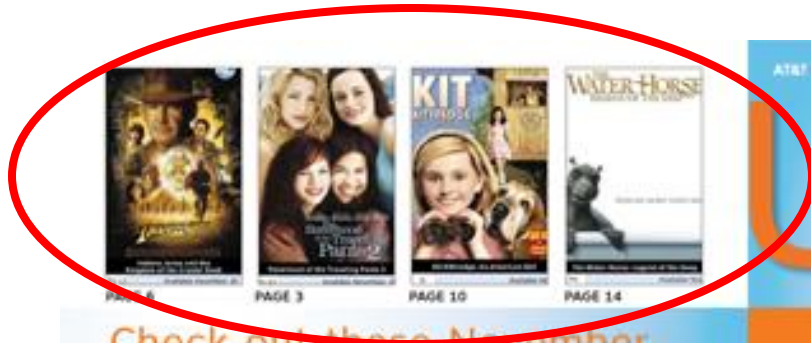
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# Digital Print Swatch "A" Elissa



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- ▶ **Alvin and the Chipmunks** (PG) Premieres Nov. 10 on HBO ch-802/803 & HBO HD ch-1802/1803
- ▶ **KIT Kittredge: An American Girl** (G) available on Video On Demand
- ▶ **Don't miss An Old Fashioned Thanksgiving.** Nov. 22 at 9pm on the Hallmark Channel ch-176

Elissa Smith  
123 Main St  
Anytown, Anystate, 12345

**U-press**  
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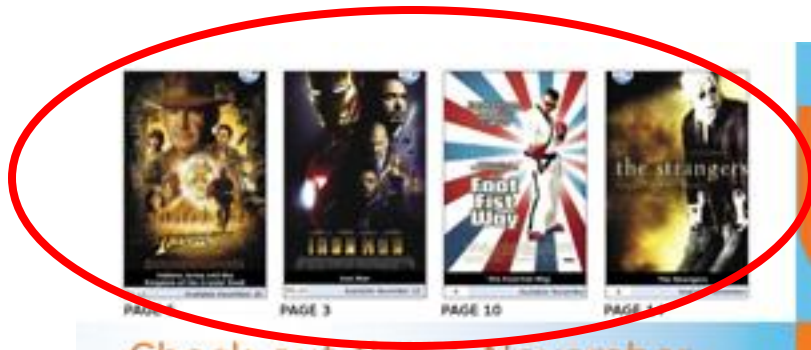
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All titles subject to availability. © 2008 Available Nov. 10

Iron Man (PG-13) Available Nov. 10

The Incredible Hulk (PG-13) Available Nov. 10



Eric Smith  
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- The Foot Fist Way (R)**  
Premieres Nov. 10 on HBO ch-802/803 & HBO HD ch-1802/1803
- Ironman (PG-13)**  
available on Video On Demand
- The Stranger (R)**  
Nov. 22 at 9pm on the Hallmark Channel ch-176

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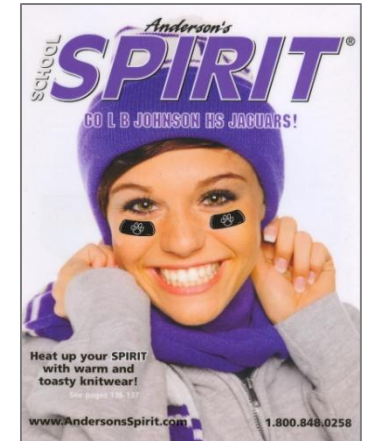
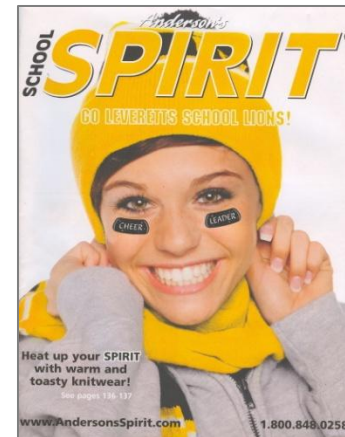
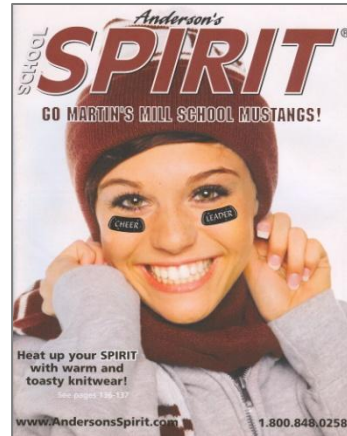
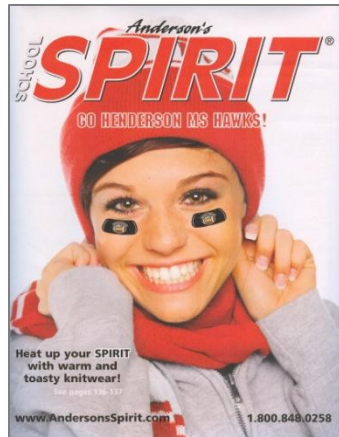
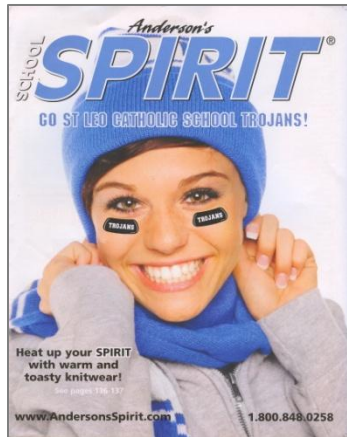
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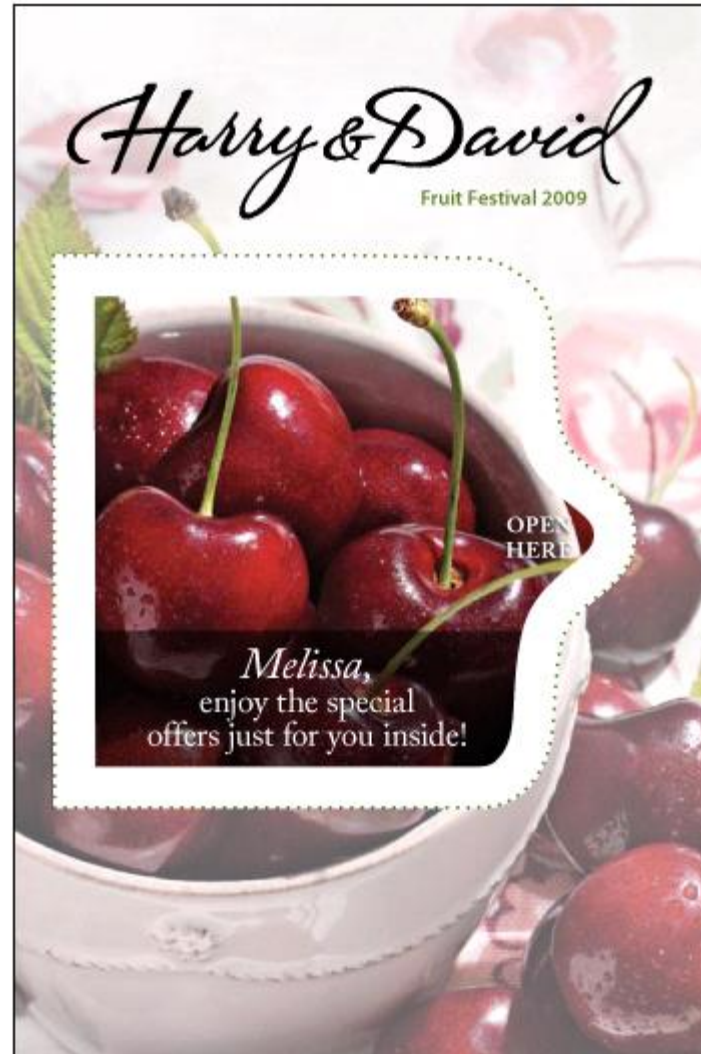
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