



What makes a good printer?

A best practice study from Vision in Print

Prepared for Vision in Print by Clare Taylor Consulting

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Acknowledgements

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InfoQuest has been an international leader in Customer Satisfaction surveys for 15 years. More than 60,000 surveys have been completed worldwide, generating over 2 million responses. InfoQuest achieves remarkable response levels – typically 70% or more - by using the patented InfoQuest box response device.

InfoQuest's unique process can be used flexibly for many applications – Staff Surveys, Membership Surveys, Brand Surveys etc as well as for Customer Satisfaction surveys. The major advantage of the InfoQuest process is that it provides unrivalled qualitative data at cost levels that cannot be matched by traditional interviewing techniques. For more information go to www.infoquestsurveys.com

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Preface: Vision in Print

Vision in Print - The Print Industry Forum

ViP was established in April 2003 and is still part-funded by the DTI as a part of the Government's manufacturing strategy. The Board is made up entirely of executives from companies in all sectors of the UK printing industry, large and small, Amicus GPMS. The mission is to implement a programme of practical activities to benchmark and improve competitiveness of individual companies and over time raise the performance of the whole industry. There are nearly 20,000 print companies in the UK, across sectors as diverse as newspapers to food packaging.

Vision in Print make no sectoral distinctions and introduce companies to lean manufacturing techniques by applying the Industry Forum 'hands-on' approach. The in-company performance improvement programmes are delivered by ViP's highly skilled engineers. These activities usually focus on manufacturing, however customer service, customer added value services, business processes and creating the right team and continuous improvement cultures are all areas tackled with clients. Vision in Print are also conducting a series of Best Practice studies using experience from both Print and other industries; it will publish reports on key topics, the aim being to raise productivity and highlight key issues for the whole industry.

Current Products

Premier Snapshot
Masterclass
Masterclass Lite
Kickstart
Booster
Change Cycle
Profit by Customer Service
Value Stream Mapping
Lean Champion Mentoring

Partners

Constructing partnerships was a key task in the first year of operation, with active links forged with all the main trade bodies and research associations serving the printing industry:

British Printing Industries Federation, Proskills Print, Amicus GPMS, EFTA, SPEF, SPA, BAPC, PICON, IOP (now called IP3), Pira

More information about ViP can be found on the website www.visioninprint.co.uk

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Introduction




This project was developed by the Vision in Print Customer Strategic Advisory Group, which is made up of senior print buyers in all print sectors. Its aim is to help printers understand what print buyers are looking for from their printers: what makes them select a printer and what makes them continue working with that printer. As needs may change according to the experience of the buyer, the size of the company they work for or the type of work they buy, the research looks at these differences as well to help printers understand them.

The project has two outputs: this report and an assessment questionnaire for use by printers. The questionnaire will help printers to assess themselves against the various service areas highlighted by buyers as important. Ideally, printers would also ask their customers to assess them using the same questionnaire. They can then see if there are any areas they need to work on and which are the most important for the type of customers they have, or would like to have. The feedback section of the questionnaire gives examples of best practice gathered from buyers during the research to help printers develop these areas: the kinds of things that buyers felt “make a good printer”.

So that as many printers as possible are able to use it, the questionnaire is designed to be downloaded from the ViP website as a pdf document, with its own instructions for use.

This project also links into other work by ViP that will help support delivery of improvements for printers.

The research breaks down into several parts, as explained below and in the more detailed explanation in the appendices. It was designed to elicit a broad range of respondents, which was achieved, giving us the following:

-  155 responses to the InfoQuest survey (a 70% response rate) breaking down as shown in the matrix (the undecided three are not included in our totals)
-  133 written surveys received
-  24 in-depth interviews carried out, over 23 hours

Buyer matrix

Main type of work purchased	Size of buyer's budget				Totals
	Large	Medium	Small	Wouldn't say	
Point of Sale	3		3	1	7
General commercial	15	28	36	2	81
Magazines & periodicals	7	4	5		16
Books	8	3			11
Packaging & labels	8				8
Direct mail	5	2	5	1	13
Catalogues	5	4	10		19
Undecided				3	3
Totals	51	41	59	7	158

The geographical spread breaks down into 94 London-based print buyers, with the remaining 61 spread across England and Scotland.

How we did the research

We approached the research in several ways, and the findings here come from an analysis of the combined results. Respondents to the surveys were either nominated by steering group members, volunteers who heard about the project from seminars and the trade press or customers of printers who agreed to have their customers surveyed to help us achieve the spread of buyers we needed. The survey was sent out to 223 buyers in total.

InfoQuest survey

InfoQuest are an international specialist in getting objective information for customer satisfaction surveys. An interesting feature is that they use printed question cards and a box with slots to drop them in – something which encourages an instinctive ‘gut’ response better than a paper questionnaire. Topic areas and questions were formulated with the help of the Steering Group, to ensure that the important points were covered, but keeping the questions general so they could apply to any type of printer. We used their survey in an unusual way.

We asked those buyers who were not nominated by printers to answer with their preferred supplier in mind. The other buyers replied based on the printer who nominated them – thus a printer who had already succeeded in winning their work in

a competitive market. The written surveys we received comprised 58 from the first group (describing an unknown preferred supplier) and 75 from the second group.

We then looked at all the responses combined, working on two assumptions:

- 🌈 If all these buyers were generally satisfied with a point, it indicated something that is important to them – that's why they are working with these printers
- 🌈 If the buyers overall were generally not satisfied, then it's something that doesn't matter so much – these are still their preferred suppliers despite that.

This part of the survey gave us information on what buyers actually want from their printer – what keeps them on their preferred supplier list.

The written surveys

When buyers are choosing a new printer, they will be thinking in a different way. To get an idea of what they look for here, we asked them, on a written form, to rank the same topic areas 1 to 5, with 5 as most important. We then analysed these results.

We also asked a number of optional questions, to gain a bit more depth. They were:

- 🌈 What is the one thing this printer does particularly well that makes them a preferred supplier?
- 🌈 What would you consider to be the most single action this printer could take to enhance their value to you as a service provider?
- 🌈 What is the one thing that, if improved, would encourage you to give this printer more work?
- 🌈 Are there any other important issues, not covered by these questions, that determine in your mind what makes a good printer?

And we asked if anyone had any additional comments.

Very few of the answers just covered one topic area, so we are unable to state that 'X out of Y responses' said the printer was a preferred supplier for whatever reason. However, by seeing how many of the responses included a topic, we can get a good sense of its importance.

Interviews

The final part of the research is the interviews. These were with a mixture of buyers, again to get more understanding. Interviewing buyers in small, but busy agencies and interviewing fairly new buyers in large corporate buying departments gave

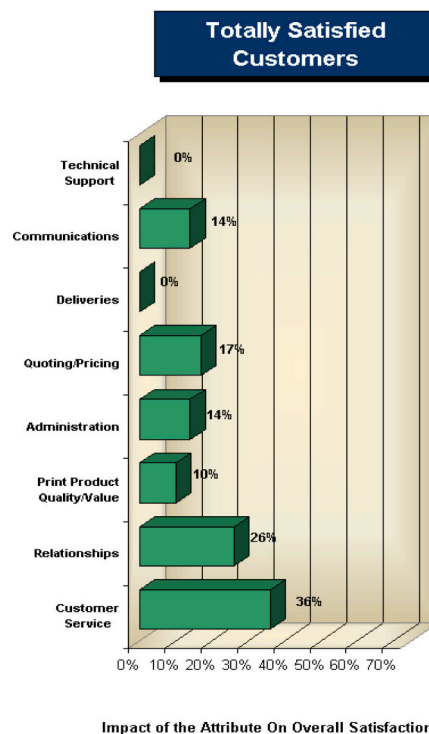
differing layers of understanding, as did interviewing some small direct buyers: people whose ‘day job’ is something entirely different but who have to buy print as well – and without any training or support from expert colleagues. Interviewing the experts from the Steering Group helped understand the demands of that particular marketplace, and what the very professional buyers are looking for. All these interviews also gave us further information for the feedback section of the questionnaire – buyers were asked what they look for, what really gives them problems and also what is the ‘one big thing’ that a printer should do to really make a difference. And what is the major thing they should avoid at all costs.

Overall

Putting all this together helped us see what buyers say they want when choosing a printer, what actually makes them stay working with that printer (which is not always the same, as some things you can’t tell in advance – such as relationships) and what printers can do to be, in the buyers’ opinions, ‘good printers’.

Key messages for printers

The main message coming out of the research is “Yes, buyers are looking for lower prices, but quality of service is equally, if not more, important”.



The chart above shows the impacts of various attributes on the overall satisfaction of totally satisfied customer. Appendix A gives more information about the research used in developing this.

Customer service, from the print buyers' points of view, is about devoting yourself to their needs. Not just delivering a good end product, to specification and on time and at the right price, but making the journey along the way as easy as possible. Very importantly, it's also about looking beyond what they've asked for, and using your expertise to see if there's a better way of doing it. To do this, you need to know something about the customer's business, and to understand what they need to achieve.

Buyers select printers to quote according to their quality of service and *only then* choose according to price

A second and very important message is just how much printers gain from learning about their customer. If it's a new prospect they are approaching, they are far more likely to get their foot in that door to be heard if they know enough about the buyer's business to make a very targeted approach. If it's an existing customer, knowing what's important to them can help ensure that they are offering what is wanted, and, just as importantly, not wasting time and money on things that are not important to them. More detail of both these points is given in the following sections and best practice advice is included in the assessment tool.

Know your customer!




A further important point to think about is that a buyer's job is to support their employer's business: to know what is important to that business and find the best ways of delivering it. Their employers will not necessarily consider a detailed understanding of print an important part of this. So, with the exception of a minority of buyers with an involvement in the more technical aspects of printing, buyers are not so interested in what your plant is, as in what it can do for them and how it can help their business. Giving detailed technical specifications of your plate-making, press and workflow management is unlikely to grab as much attention as saying how you can use it to deliver better value: by shortening schedules, bringing costs down, giving guaranteed colour matching across all parts of a project – whatever is important to the type of work they produce. And then backing it up.

A plant list does not impress half as much as saying what you can do for the buyer

The bottom line

The main thing to take away from all this is that printers must offer both high levels of customer service and competitive prices. Cutting corners to reduce prices will lose the customer. So you have to focus. There are two main things to think about:






Who do you want to sell to?

-  Are you looking for a particular type of customer?
-  Do your structure and plant suit their needs?
-  If not, should you be looking for a different type of customer, or should you be changing your company?

For example, some buyers prefer to only deal with internal customer services staff – they do not need sales representatives to call on them. If most of your customers – or those who you would like as customers – feel this way, you would do best to focus on building good people inside, not on sales.

Control your operating costs

Be ruthless – most printers waste a lot of money without realising it.

-  Look at your equipment – and at ViP's *Maintenance Best Practice Study*. Are you getting the most out of what you've got?
-  Look at what you're buying – are you getting the best deals? ViP's *Purchasing Best Practice Study* can help you here
-  Perhaps a hard look at the way you work can reap rewards. Many have found this to be the case after one of ViP's Productivity Improvement programmes.
-  How much money are you throwing away every day? Current estimates are that waste costs a company as much as 4% of turnover, and this can be reduced by as much as a quarter – giving you back 1% on the bottom line! Ask Envirowise for a free one-day visit to advise on how you can cut waste costs. They can help you reduce how much water you use too.
-  Are your energy bills higher than they should be? The Carbon Trust offer free advice on how to use energy more efficiently.

And finally...

-  Are you thinking about what will help your customer's business?

The research findings

The findings from the surveys and interviews are shown in the following sections, divided into the attribute areas. These pages say about some of the things that buyers are looking for – what printers need to show they can do.

Suggestions on how to do this are included in the feedback section of the Assessment Questionnaire. These have been gathered by asking the print buyers interviewed, reading their comments on the surveys, and talking to successful printers. A companion project *“Competitive advantage through customer service excellence”*, commissioned by Print Yorkshire and part funded by Vision in Print, supplies further support. The research, by Tim Wilkinson of TWA Business Consultants Ltd., supplies valuable insights into how successful printers are currently achieving best practice. Completing the Assessment Questionnaire is the next step after reading this report.

For those of you more interested in more a detailed analysis of what we found, there is an appendix for each topic at the back, giving the statistical information. These appendices show top line responses to specific questions, broken down across the sectors, along with more information about the research and the questions asked.

“Price alone will never get a printer through the door”

Product quality/value for money

Product quality/value for money and quoting and pricing were treated separately in the survey, but during the interviews it became obvious that they are so closely linked that it made sense to combine parts of them. Some of the areas where the buyers feel they are perhaps not getting good value for money are because of missed opportunities in quoting – such as not using the full range of paper sizes available to keep down costs. Developing the estimating process can do a lot to help give buyers better value for money.

“Anyone can get a cheap price, but being able to deliver the requirements is what counts.”

What we found:

Price **is** important, but it is not the most important consideration. It is value for money that buyers are looking for – and this includes service as well as product quality. Quality is not an absolute, but seen in relation to the job – buyers do see a difference between work that requires commercially acceptable quality and premium work. They accept that premium quality requires additional input that will show in the price. Buyers also take the other service areas (explored in the next sections) into account when deciding whether a quoted price is value for money. Customer service is the prime criterion. Buyers felt that the more experienced a buyer, the more they will look beyond price to the value that a supplier can bring to a working relationship – buying purely on price is considered to be the way of non-professionals who do not understand print.

“Cost is very much not the most important factor. Service is the key issue.”

Defining quality

Good commercial quality of work, fit for purpose, is a given – buyers expect that as the norm. They also look for consistency and, particularly corporate buyers or print management companies representing such, see colour managed workflows as a valuable means of ensuring this. This is explored further in the section on Compliance, as the ISO standard *for ‘Graphic technology – Process control for the*

production of half-tone colour separations, proof and production prints' was mentioned by a number of major buyers.

Specific printers may be used for the top range work where quality is an absolute priority and where "every copy has to be perfect". Such printers are acknowledged to have a higher cost base, and quotes are compared with similar printers.

"A press insert which is going to end up in the bin does not require the same quality level as a business-to-business communication – and so can be bought accordingly, at a lower cost."

The product quality aspects most important to buyers are that print consistently meets with specifications and that quality issues are resolved promptly. (More information on this can be found in the appendices.) Printers seeking regular work from the major buyers, whether tendering for a contract or being reviewed for inclusion on a supplier roster, are generally assessed against a range of requirements in addition to product quality and price, which may include customer service structure, communications, capacity (in cases where high volumes of work would be required), business performance, including continuity plans and investment plans, and compliance against standards required by the buyer's organisation. Delivery of such is what forms 'value for money', along with other attributes which can only be assessed once the printer has starting working with a buyer. These are important for retaining the customer and being given work on which to quote: being under contract or on a print roster does not necessarily mean this opportunity can be taken for granted.

Where price is important

Price is not a primary selection criteria, but once a printer is on a buyer's regular list of suppliers and is trusted enough to be regularly asked to quote on work, price is the main deciding factor on how much work that printer gets. But good prices must remain within the context of the other desirable characteristics – reducing prices to the detriment of these will reduce the value of the printer to that buyer and so limit opportunities to quote.

This seems to be an area where many printers are losing out on opportunities thorough not giving sufficient attention to available options when quoting, which could either reduce the cost – to them as well as to the customer – or add value.

Reducing cost/adding value

The printer does have the opportunity to use their expertise to seek ways to keep costs down when preparing an estimate, but it appears many are missing out on this opportunity and so losing work to competitors.

Print buyers most frequently commented on this happening with paper sizes: for example quoting on SRA1 when the project could be printed on 630 x 880, offering a worthwhile overall saving. A couple of major buyers commented that they had carried out some checks with their supplier bases, comparing the paper sizes offered, and both found that roughly half of the printers were quoting on a standard size where a mid-size was suitable and more cost-effective.

Other areas where a printer's expertise can add value include advising on alternative formats or sizes: a couple of millimetres off the size could save a considerable sum – but the buyer may not be aware of this. Sometimes suggesting a completely different approach can make the world of difference, especially with a non-expert buyer. Direct customers (non-agency buyers) in smaller companies often know what they want to achieve, but not the best way to get there – and may not feel they can ask.

In summary

Price is important, but value is more so. What is likely to get the best results is working on how to make your company valuable to the customer.

★ Key messages for printers ★

- ★ Price is *not* what gets a printer included on a preferred supplier list.
- ★ Price *is* what gains more work once there – but only when other criteria are filled.
- ★ Suitable quality is a given – buyers look beyond this.

The feedback section of the Assessment Questionnaire is made up of comments from buyers. Here are a few examples:

What helps deliver value:

- *“Are you able to offer a paper similar to the one the customer has asked for at a better price, as an additional option?”*
- *“Thinking about the specification and going beyond it. Answering questions the customer hasn't asked and offering alternatives to either deliver a better piece of work or a better price.”*

Some common problem areas:

- *“Lack of attention to detail, allowing minor errors to slip through.”*
- *“Not matching specified ink densities.”*

Range of products and services:

This is where knowing your customers can really help. Generally, larger buyers, especially where there is a big print-buying department, will look for specialists for each type of work. Smaller buyers, particularly those who just do the print buying as part of another job, will tend to look for someone who can take on everything for them. But this is **not** always the case.

“Shades of ‘Jack of all trades, master of none’.”

What we found:

For much of the work they buy, the professional buyers (those whose sole job is buying print – so mainly people in larger companies), and especially those who are part of a team of buyers, will look for different printers for each type of work they produce. They want printers who specialise in that kind of work, and so do enough of it to be expert, to be best equipped to produce it and to be able to produce it at a good price. They will usually prefer to do their own sourcing of any parts of a project, other than finishing, that a printer they are using would have to buy in.

In direct mail, for example, they will happily buy letterheads from one printer, the leaflet from another, the envelopes from a further and then bring it all together for personalisation and enclosing. It is not necessarily an advantage if you can do it all. But in a smaller company, an agency, perhaps, instead of a major corporate with its own in-house department, the buyer may not have the time to do all this.

Larger direct mail buyers will still sometimes look for someone who can do it all – because they are short-staffed, or because it's a smaller project and they need the time to spend on the larger projects, or because the timing is so tight they don't want to risk one supplier out of a number delivering late and letting all the others down. Or because they're in financial services, and so it affects the VAT.

Larger buyers generally seem to work the same way – they use a range of different types of printer to do different types of work. But again, if there is something unusual, which they don't normally buy and probably won't again, they may want a printer to buy it in for them – to save them time, or to save them the difficulties of arranging payment for a new supplier.

Exceptions – where diversity is an advantage

In smaller companies, the person buying the print will often not have enough time to manage several different printers doing parts of a job. They may not be buying long enough runs for there to be much benefit in doing this rather than giving it all to one printer.

“I say what I need to achieve, and they tell me how to do it. If I have a design for one item, they will take bits of it and lay them out to make other things for me.”

If the company is not an agency, whoever is buying the print is often mainly doing completely different types of work, and so knows few printers and little about the process – because it's not their main job. They are not a specialist, have a hundred other things to do, and will very likely be very glad of some help, some advice and someone to take the problems away.

Point of Sale

Some point of sale buyers look for printers who can offer litho printing, screen printing and digital printing all under one roof. They feel this helps achieve colour consistency across a range of different sales materials – something that is often needed for a project. Other types of buyer, also producing projects for which several different items need to match, may feel the same – but not all. Some still prefer specialists in each type of work. These buyers may then require assurances of effective colour management to ensure the required match across the elements.

**“Project management time
is greatly reduced.”**

Books

Book publishers may also be interested in a printer offering both litho and digital printing. Certain types of book have a long life, starting as a litho print run, but then ending as digital – being able to keep it in one place is useful.

For ‘the average type of book’, publishing buyers look for an ‘all in’ service: cover printing and finishing, text printing, binding and buying the paper. But there is still a place for the specialist cover printers, binders and so on – for those extra-special books where particular skills are needed.

Magazines

Publishers will out-source certain types of work to their printer. For example, if a printer is buying a particular type of work for a number of the titles they print, they will have the advantage of buying greater volume than the publisher. In such cases, the printer can therefore offer a better deal to the buyer than they would get sourcing direct. This might be something to think about – what opportunities of this kind are there that printers could be using to offer added value?

“Sometimes they will decline a job, saying they can’t do it, when perhaps they could, but in a slightly different way – only they don’t say. They should.”

Where printers might be missing out

Printers, it seems, are not very good at keeping customers informed about what they can do. So they tend to be pigeonholed and only thought of for perhaps a limited type of work. Likewise, printers maybe pigeonhole customers, not realising how wide a range of work that customer might buy. So it’s always worth letting them know what else you can do for them. **But** it is important to do so intelligently. Learn about the customer and don’t smother them in unwanted information

It is also worthwhile, if asked if you can do something, to think around it – can you achieve what they are looking for in a different way? Alternatives that are faster or more cost effective for you to produce, or simply different and interesting, may be welcome.

If you are thinking of adding a new service

As stated at the beginning of this section, knowing the customer and the market is very important here. Is it the kind of business where, by bringing a service in-house, you can speed up turn-around and allow your customer to get their product to market faster? Do your customers often need to change artwork at the last minute, so could be helped if by a printer who could handle application files? Could you save them money on distribution, by combining their deliveries with those of other customers? Think about what they are trying to achieve for their business with the print they buy, and what could help them be more effective.

“One-stop shops can offer a benefit if it is tailored to our need ... this enables a much faster response to slow movers in our product lines.”

Summary

Different buyers have different opinions of whether a wide product or service range is a good thing or not. The same buyer will also have different opinions, according to what they are doing and how much time they have. So the main thing to take away from this is to get to know the market you are working in, and get to know your customers. Then you can decide if you are offering what you have to the right types of customer, or if you could get more work by expanding what you offer.

★ Key messages to printers ★

Buyers are most likely to be looking for a printer to take on everything if:

- ★ There are several parts to a job and they don't have time to manage them all themselves**
- ★ Each part of a job depends on another and they want one company in control**
- ★ They lack the knowledge or experience to find different specialists**

“I have suppliers on my list that have quadrupled turnover with us by offering excellent account management and pro-active customer service”

Customer service

In every part of this research, customer service came out very strongly as what is most important to buyers. It is what they look for when choosing a printer, and what makes them stay with that printer. And it was important to everybody – large or small, experienced or inexperienced, whatever type of work they did.

What we found

Customer service is universally important. It does mean slightly different things to different people – but some aspects of it are important to everyone.

- 🌈 Consistent points of contact – knowing who to speak to and being confident they will respond. Most buyers preferred one point of contact only, either an individual or a team. This helps their contact get to understand their business, means there are clear responsibilities for ensuring things get done, and means they always know who to ask. Only very few liked to talk to different people in each area – estimating, production and so forth.
- 🌈 Being kept informed. Not having to phone and ask if everything's going OK on their work, but having someone phone or email them to tell them.
- 🌈 Flexibility. Understanding that things don't always run smoothly, that what the buyer needs can often change at the last minute, and being able to adapt to this.
- 🌈 Managing expectations well. Not over-promising.
- 🌈 Always letting them know straight away if there's a problem. This can give them a chance to take some action to prevent the consequences being so severe, and they may even be able to help sort it out.
- 🌈 Checking files as soon as you receive them. Finding out that a job is going to run late because there's problem the printer has only just discovered with a file he's had for two days **really** upsets a buyer.
- 🌈 Always returning phone calls promptly.

Customer service in a word:

“reliable”

“consistent”

“flexible”

“responsive”

“attention to detail”

“pro-active”

Where there are differences

The main differences in what buyers looked for seem to be between the very large organisations with teams of professional buyers or agencies with print buying departments, and the small companies where the buyer may be less knowledgeable and so need more handholding.

Larger organisations

“We need servicing, not being sold to”

There seems to be general agreement here that they don't need sales representatives to come and see them, except for specific purposes. What they want is a person, or a team of people, who are always there, at the printer – never out seeing other customers. Unplanned visits from sales people who 'were in the area, so thought I'd drop by' tend to be an annoyance – it takes time they can't spare.

They need consistency of service – and this means making sure that when their usual contact is on holiday, or sick, someone else can take over and know exactly what's going on.

“When our main contact is absent, we become concerned about service levels”

This type of buyer will generally have many jobs going through at a time, with many of them part of something larger. It will therefore be more important to them to know exactly what's happening on their work at all times.

Smaller buyers

Smaller buyers are less likely to have the structures in place for remote working – electronic file transfer, remote proofing and so forth – and so are more likely to need someone to come in and pick work up and drop off proofs.

“We don't know much about print here – we need someone who is supportive and helpful, and will explain things to us”

Unless they are an agency buyer, and so knowledgeable about print, they will generally need this person to be someone who can spend time with them to explain things. They are also likely to need help with putting estimates together – they know what they need, but not how to describe it. So someone who can come in, talk through it with them, show them examples, make suggestions is very valuable. An experienced buyer will know what a folder with a 5mm capacity pocket is – someone

who rarely buys print needs to see an example, and to see how many sheets of paper fit into it.

What else to know

The buyers interviewed all appreciated that things will go wrong sometimes. They will make mistakes, or have sudden changes made to the project that can cause problems. All of them said they really appreciate the printer who works with them to help resolve things.

“Everyone is going to screw-up at some point – what’s important is how they un-screw up”

In the same way, the professional buyers all accepted that the printer will sometimes make mistakes, or have an equipment breakdown, or something else that creates a problem – and they are willing to work with the printer to help resolve problems. Their experience and supplier base may be useful, or they might be able to reschedule – **but only if they are warned in time!**

A printer’s reaction when things go wrong seems to be an important part of both customer service and building a strong relationship between the printer and customer – two areas that are very closely linked.

Summary

Customer service is king! If you get that right, everything else seems to fall into place. It is worth noting that several buyers commented on the fact that it’s the print management companies who have really got customer service sorted. So maybe that’s where printers are really competing with them.

★ Key messages for printers ★

- ★ Customer service is the most important area of focus for a printer**
- ★ It has the highest impact of anything on customer satisfaction**
- ★ It is the main attribute that made printers a preferred supplier**

Again, buyers’ comments feature in the feedback section of the Assessment Questionnaire. Some examples are:

Good customer service involves:

- *“Being consistently available, responding to enquiries, being helpful – always being there.”*

- *“Depth of knowledge combined with a ‘can do – will do’ approach.”*

A common problem area:

- *“...suppliers who don’t come clean on problems at the right time – perhaps because they’re hoping they can solve it. But if they don’t, time has been lost when we could have been doing something about it.”*

Relationships

This is a difficult area to get an understanding of. A strong relationship is clearly important: the impact it has on satisfaction is second only to customer service. Buyers talk about how important it is, and it is clearly linked with customer service and communication – but how to define it is not easy. It is also something that can only happen once the printer is working for the buyer, which makes it hard for printers looking to get work from a new customer.

What we found

A good relationship with a printer strongly enhances their value to the buyer, and encourages the buyer to keep them on a preferred supplier list and to keep asking them to quote for work.

**“Printers are born optimists
and tend to over-promise”**

Good customer service and effective communications help build the relationship: the main thing buyers seem to be looking for is someone they can trust, someone they can rely on. They want to know they will not be fobbed off, but told the truth, always.

The only way to achieve this is track record – having a good track record elsewhere and being able to supply references, or let a prospective customer talk to existing customers can help. Buyers don't like taking risks placing work with someone they don't know: proving yourself elsewhere reduces this risk.

“...always doing what they say they will do”

How to get off to a good start

The answer here, once again, is know your customer. Many of the buyers interviewed commented on how printers would make an approach to them without knowing the slightest thing about their company or the type of work they do. Those are the printers who don't even get an appointment to see them. Getting to know as much as you can about them first, and understanding the type of work they need, makes a big difference. It will also save a lot of wasted calls – lots of buyers commented on cold-calls from printers who would never be able to do their work anyway, because they are not equipped for it.

Keeping it going

Like all relationships, it needs to be worked at, constantly. Keep stepping back and taking a look at how it's working, as everything changes over time and it's easy to let

it slip. One thing print buyers with long-term relationships commented on quite frequently was the problem of printers getting complacent.

Summary

This is an area with no easy answers. Once you are working with a customer, then you can work to build a good relationship over time, but it very much depends on people. Hiring the right staff, training them to be effective in their roles, empowering them to make decisions, giving them the authority to ensure that what they promise will be done.

**“Most important to a relationship:
reliability and trust”**

★ Key message to printers ★

★ Trust is vital

Some examples of what buyers felt helps build a good relationship:

- *“...It doesn’t have to be the big things – it can be the little things. But consistently doing what they say they will do.”*
- *“...where we are learning from each other, - not just one-way.”*
- *“...working together to achieve results and resolve shared problems.”*

The estimating process, administration and invoicing

This appears to be an area that buyers don't particularly think about until they start working with someone. Then it starts to become an issue. It's not a critical area – not something that is a key deciding factor in whether or not a printer remains on their supplier list – but it's something that can become a major irritant to buyers when it doesn't work. It can affect a working relationship and has a measurable impact on satisfaction.

“Printers seem to have some kind of mental block about using a customer's job number”

'Administration' and 'Quoting and pricing' had been separate sections in the surveys. The 'setting the price' element of estimating has now been included in the first section, as being part of offering value for money. The process – taking specifications and how the estimate is provided – is included here with administration as so many responses show that they are closely tied together.


What we found

For quoting, buyers in both large and small organisations have similar needs. But there is a definite, very clear difference when it comes to invoicing and general administration. Survey results showed that, overall, buyers were fairly satisfied with their printers' administration and the promptness and accuracy of invoices. But this is an average – and when broken down by size, the picture changes. Buyers in small companies find their printers' performance generally good, but larger buyers find invoices a definite problem.

“Our biggest criticism is slowness on quotes”

Estimating

There were two main issues here:

 Speed of turnaround (or of declining to quote)

 Attention to detail:

- Following the specification and matching it exactly in the estimate. Many felt that printers did not read the specification properly, and so missed out important elements. Alternatives were welcome, but in addition to what the buyer requested.
- Stating exactly what had been quoted on, so that the buyer could be sure nothing had been missed
- Laying out the estimate the way they had asked, so that they could compare easily

“I do not enjoy playing ‘spot the difference’ competitions on estimates that come in”

Invoices

All the buyers in larger organisations had a lot to say about the time wasted when printers don't put the correct information on their invoices, and how frequently this happens. Most of their companies have automated systems for matching invoices to orders and passing them for payment if the price is as agreed and all the details match. If the price varies even slightly – because, perhaps, the printer has forgotten to tell them they need to add an extra charge – or if the relevant reference numbers aren't on it, the accounts system will bounce it. Then the print buyer has to try and track down the job and sort it all out – which can be very difficult if all the invoice says is “10,000 copies of 16 page leaflet as quoted” and you produce dozens of 16 page leaflets each month.

Once an invoice has failed within the automatic system, even if the buyer can find the necessary information straight away, or can make any adjustments to the purchase order for additional charges, time will be lost – everything has to be started all over again. This will hold up payment, and there is nothing the buyer can do about it.

For buyers in smaller companies, this is much less of a problem – systems are usually manual and there are far fewer invoices coming in for the buyer to match if they need to.

“Printers tend to focus on production and don't pay enough attention to administration”

Other areas

Other areas mentioned were status reports and job tracking, sending file copies in promptly, version control for proofs and keeping track of paper use, with prompt reporting, when the customer is buying the paper. Apart from the last, these were mentioned by a range of buyers, both large and small, so don't appear to be so tied in to the size of an organisation or the volumes of print purchased.

In summary

Attention to the small details makes a big difference to how smoothly the work flows through from the initial estimate to the final stage of paying the printer. Not following this causes aggravation for the print buyer, late payment for the printer, and may damage an otherwise good working relationship.

★ Key messages for printers ★

- ★ **Poor administration causes problems for both the printer and the buyer**
- ★ **Missing off job numbers can seriously damage your cash flow**
- ★ **Turnaround time of estimates is more important than you think**

A couple of examples from the buyers' comments in the Assessment Questionnaire feedback:

- *“Estimates – must be presented in the way we have asked for them (and ideally have some other ideas and suggestions as well).”*
- *“Chasing purchase order numbers or credit notes is a waste of time and money, delays payment and impacts on the printer's cash flow.”*

“They ask searching questions to help find out what I need and provide a better service.”

Communication

Communication is, of course, what enables everything else and its importance was reflected in results of both the InfoQuest survey and the written survey. Good communication allows better understanding of what type of service the customer wants, which products and services are of interest to them, what exactly they are looking for in their specification. It allows you to know how they like to work, what they feel about how the last job went, what would help you get the next. It is strongly linked with relationships as well as customer service levels, and also with customer awareness.




Perhaps the most important thing to note is that good communication does not just mean how you talk to, or otherwise communicate with, the customer. It also means how you listen.

“the worst thing a printer can do - not listening”

What we found

Good communication is a major factor in both getting the customer and keeping them. Much of this is to do with people, but systems are needed as well. Printers appear to be generally good at keeping in touch with their customers, but less so at sharing knowledge internally – an area where having an internal system in place does make a big difference, whether paper-based or computerised.

Most of the buyers preferred to have a single point of contact for communications, as stated earlier in the customer service section, and in this case structured communication is even more important. A good internal communication system ensures that:

-  All relevant information is communicated to people to do their part of the job – and that includes things like what should go on the invoice.
-  If anyone spots anything that might be an error, it is communicated back to the customer contact, so they can query it.
-  If there are any problems, they are communicated back to the customer contact so they know to inform the customer.

- 🌐 Communications are documented, making it easier for someone else to pick up the work in case of absence of the main contact.

Speaking to people

Accessibility is an issue for many buyers – not being able to penetrate the voicemail barrier, and not being able to get hold of anyone after the switchboard shuts in the evening were the two main problems mentioned.

“It’s important to let us know what’s going on”

How much communication?

This is very difficult to judge, and involves getting to know the individual customer. All buyers wanted regular communication about progress of their work, and most wanted to be kept up to date with new developments at the printer and industry information that was relevant to their business. Many said in interviews that printers are not very good at keeping them informed, as previously mentioned in the customer service section. They also did not like first hearing about new plant ‘their’ printer had bought by reading it in the trade press. But none wanted to be pestered with too much contact or irrelevant information.

Buyers’ time is at a premium, and the luxury of being able to talk with a supplier who just drops in on them is rare, as is being able to spend as much time on the phone as many of their printers seem to expect.

“Sales staff who know when *not* to keep ringing up”

Feeding back

Many of the larger buyers, and some of the smaller, had formal systems in place for regular reviews and feedback. Where these don’t exist, buyers welcomed printers who created opportunities for feeding back. This allows minor problems, that might otherwise develop into something more serious, to be sorted out promptly.

Buyers also recognised the importance of hearing where they or their buying team needed to make changes in what they were doing.

Where there are differences

There seems to be a general difference between larger companies and smaller.

- 🌈 A larger company with a team of buyers is more likely to want communication restricted to the minimum necessary to enable a smooth flow of work and will contact the printer when they want something.
- 🌈 A smaller buyer is more likely to rely on a printer to advise them, and so may appreciate more pro-active contact.

This only general, however – talking to the customer and asking what suits them is the only real way to know.

Summary

Good communication is important both to gaining and retaining customers. It is what facilitates everything else, and involves listening as a key part of it.

★ Key messages to printers ★

- ★ **Good communications underpin everything else**
- ★ **The most important thing you can do is listen**

Further comments from buyers are included in the feedback section of the Assessment Questionnaire. Some examples are:

To do:

- *“Be accessible – that’s important”*
- *“When a job’s in progress, let me know what’s happening, even just to say it’s on schedule.”*

To avoid:

- *“Don’t overload the buyer with constant contact.”*
- *“Major thing to avoid: not phoning back”*

Deliveries

Timely deliveries are another 'given'. It was the most important attribute when selecting a printer, and buyers don't stay with a printer who fails to meet this requirement. This was absolutely across the range – all sectors and all sizes of buyer.

“Being able to track a van when a job is late is important.”

What we found





Delivery on time is essential. Occasional delays are understood, traffic problems and breakdowns being a way of life, but in these instances good communication comes to the fore. A printer who is in contact with their driver, who can notify the customer immediately and give them a good estimate of when the driver will arrive, scores points.

Keeping exactly to the delivery instructions is a bit more 'negotiable' in that buyers will continue to work with a printer who slips up here. But such printers risk losing out if a competitor manages this area better. Carefully reading and following instructions helps prevent problems further along the chain.

“Not missing their slot is critical, especially at peak times.”

Differences between sectors

Differences here are not so much between sectors, as between types of business. Those that require delivery into warehouses, distributors, fulfilment houses or other places that have numerous deliveries will tend to have quite stringent requirements:

-  booking delivery slots in advance
-  labelling in a particular way
-  accompanying documentation
-  packing in a particular way

The demands are placed by the delivery location, and they may refuse to accept a delivery if they are not met. If they do accept it, but it is not properly labelled, it may easily be put into the wrong location within the warehouse, and so be lost.

Organisations whose work is delivered to third parties are also the most likely to need good proofs of delivery – with a date and time, a signature and a clearly readable name. Prompt availability of these documents is very helpful, especially if the work is

lingering in the 'despatch department limbo' and the buyer's own customer has therefore not received it yet.

“Printers do not seem very good at delivery notes for finished products and despatch notes”

Differences between sizes of buyer

The larger the buyer, the more likely that detailed documentation is needed, with specific job references so that they can identify it. For smaller buyers, this is generally less important, unless it is an agency or other company buying on behalf of someone else – and asking for delivery directly to their customer.

When delivering into small companies, a goods entrance is less likely. Packing in boxes that are easily carried is therefore usually helpful, and a driver who is happy to help carry them up to the customer's office. Smaller buyers are also much more likely to meet a printer's drivers or couriers, and their appearance and behaviour can influence the buyer's opinion of a printer.

“– their drivers are always well dressed, on-time, polite –they don't even swear at traffic wardens”

★ Key messages for printers ★

- ★ **Timely deliveries are essential.**
- ★ **The paperwork is more important than many printers seem to realise.**

Some examples from the buyers' comments included in the feedback section of the Assessment Questionnaire:

To do:

- *“Take note of the instructions!”*
- *“We need access to proofs of delivery within hours, not the next day”*

To avoid:

- *“Some printers just turn up [to the warehouse], and then the delivery can't be accepted.”*
- *“...or we've had them try to deliver the work on pallets when it should have been in boxes.”*

“The speed with which our print requirements are needed is increasing, and so the extent to which the unpredictability of transfer by internal messenger/loading bay/courier can impact on projects is also increasing.”

Technical support

Technical support is our third 'given', along with suitable quality and timely deliveries. Buyers appear to expect, as a matter of course, that a printer will provide necessary technical support, will have the technical resources to be able to do so, and will continue to develop technical excellence.



“Could be more pro-active in giving information to our design agency...”

What we found

The requirement for technical support appears fairly constant across the different levels of spend – what differs is the type of technical support. Offering advice and guidance on formats, materials, file preparation are expected by buyers of all sizes, but larger organisations with high print volumes are more likely to want formal reports on technical matters. Magazine publishers, for example, may ask for a report about the printability of a paper.

“Site visits to ... have been very useful, enabling us to see the size of the operation, and to meet people and put names to faces.”

Many buyers mentioned that they appreciated site visits, either for themselves, for their staff, if they headed up a team, or for their internal customers (those people within their organisation for whom they buy print, often marketing people or designers). Such visits:

-  Helped inexperienced buyers learn more about the process
-  Helped with communication between buyers and their internal customers, by giving their customers more understanding of print.

Printers were not, as a rule, expected to offer support in terms of sorting out problems with files – but they were expected to check files promptly in case of any and to be able to identify clearly what the problem was.

Another important aspect of technical support is keeping buyers up to date: not just with new products or services the printer is able to offer, but also with developments within the industry that are relevant to the buyer's business.

“A buyer doesn't have the luxury of being able to keep close to technological developments.”

Several buyers were looking at introducing colour-managed workflows, and expecting support from their printers in their development – it was considered to be something of a joint effort. Those already fully involved in this area had more of a compliance requirement – working within the standards or standardised printing conditions – than an expectation of technical support.

Differences

The main differences were specific, product related support – such as development of formats for packaging or direct mail – and the need for a greater degree of help to buyers who are not so technically aware. These are most commonly those in smaller organisations for whom buying print is just a small part of their job.

★ Key message for printers ★

★ It is expected that a printer will be able to supply the support needed

Some examples taken from the Assessment Questionnaire feedback:

To do:

- *“Tell us ‘we have a new such-and-such piece of kit, that can do this for you’”*
- *“Reports should enable us to understand what caused the problem and thus allow prevention of future, similar problems.”*
- *“Offering additional technical advice – e.g. new stocks, print techniques, paper samples, samples of previous design jobs.”*

Customer awareness

Not many printers appear to keep information about their customers in a way that helps them improve their service. There may perhaps be a lot of information in the salesman's head, but not where it's accessible to other members of staff who may need to use it.

“...anticipating customer needs and tailoring bespoke solutions to suit.”

Centralised information about the customer base as a whole allows better understanding of overall needs, and better planning. Information about individual customers allows the same plus more targeted customer service, smoother handovers for holidays, and it makes it easier for another member of staff to help out in emergencies.

“The team at ... are attentive but not pushy, and take time to understand what we are trying to achieve.”

What we found

When responding to the surveys, buyers did not seem to regard awareness of their market or of their business as at all important. But many of the comments made on the written survey forms were all about the printer 'understanding their needs'. Perhaps the buyer doesn't see 'excellent customer awareness'. What they see is excellent customer service, a strong relationship, the products and services that interest them and add value to their business. However, a printer wanting to ensure that they achieve all this needs to score well on 'customer awareness'.

“What may appear something quite small could be extremely important – those half dozen file copies being sent somewhere could be going to a potential major new advertiser.”

Knowing the business drivers of a customer helps a printer understand how to add value: what a customer may be interested in buying, and what's important, or less important, to them – all of which buyers said they valued. During the interviews, many buyers commented on the importance of the printer knowing what they wanted and thus what would help them better achieve their business objectives.

Learning about the individual is equally important, to know how much and what type of support they need, the level and type of communication they prefer.

One of the top items on the hate list was sales calls from printers who obviously know nothing about their organisation or its business – those who had ‘done their homework’ are far more likely to get an appointment to see them.

Summary

Perhaps the most important message to take from this section is that nothing can substitute for knowing your customer and their business. Our research has enabled us to make generalisations about what buyers from different sectors or sizes of company consider makes a good printer. But these are general trends, and there were exceptions to all of them. The only way to be sure of what will interest them, build a relationship or build sales is to do your homework.

★ Key message for printers ★

★ Know your customer

The feedback section of the Assessment Questionnaire has a list of suggestions buyers made to help with this.

Some of the thoughts from buyers are:

- *“Different people may use the same terms to mean different things. Getting to know us helps prevent misunderstandings from that.”*
- *“What’s important ... really taking the time to sit down and understand the level of support that offers best benefit.”*
- *“A really good printer takes the time to take an interest in what their customers’ businesses need to achieve and how they work.”*

“ISO 14001 and 9001 used to be ‘nice to have’ but are now becoming a minimum requirement.”

Compliance

The final topic we asked buyers about was compliance: what were their needs for printers to be compliant to industry requirements or standards, such as hygiene, data or environment.

What we found

Broadly speaking, this is a growing requirement, with several drivers, including:

- 🌈 Increasing legislation – buyers do not want to risk problems under the Data Protection Act, for example, or any of the food hygiene legislation because of a lack of suitable controls in their supply chain.
- 🌈 Pressure from environmental campaign groups, and Government, is another driver – especially with paper and its fibre source. Using recycled content is important to some buyers, ensuring virgin fibre is from sustainably managed forests is to others. There have been many misconceptions and misleading statements about both in the past, and now certified papers and audit trails have become important for the assurance they provide.

“I like to see processes that can be audited...”

- 🌈 Increasing demands for corporate responsibility placed upon large organisations by a variety of stakeholders, including customers and investors, is a third driver. For some years now, this has driven the requirement for compliance with environmental standards, which is spreading down the supply chain. Corporate responsibility is now creating the need for buyers to assure themselves that their suppliers are operating to social and ethical standards they regard as appropriate.
- 🌈 Then there is predictability, continuity, assurance of appropriate quality. And to answer these needs buyers may look towards the quality standard, ISO 9001, and standards such as ISO 12647 – ‘Graphic technology – Process control for the production of half-tone colour separations, proof and production prints’ as well as various colour management controls, such as ICC profiling.
- 🌈 To answer another business need, that of reducing risk when starting work with a new supplier, there is the new Publicly Available Specification, PAS 75, published by BSI at the beginning of December 2005. PAS 75 was developed by the British

Standards Institute (BSI) and the British Printing Industries Federation (BPIF) in order to provide an objective standard that can be recognised by suppliers of printing services, and by their customers, as defining excellence in print production and service.

This list is not comprehensive – there are many other requirements specific to the nature of the work or the individual organisation buying it, and thus knowing your customer as well as the market place in which they operate is as important in this area as all others.

Some buyers required formal, certified standards whereas others had less formal demands, but foresee that formal standards will become more important in the future. Very few mentions were made of ISO 9001 – environment currently seems the more widespread need – but given the buying power of those who require ISO 9001 it is certainly an important consideration.

“Having any of the standards shows that a printer has good systems in place.”

What is important



For buyers not demanding formal certification, an ability to demonstrate an effective system for achieving what they are looking for is important. The ability of the printer to demonstrate that they are monitoring the work, are measuring whatever it is the buyer is concerned about – whether it's colour, waste or recycled content of paper. Simply having policy statements is not enough – they need to be backed with audit trails to prove they are being followed.

What is less important

Formal certification is currently less important than a demonstrably effective system. But working towards formal certification is an expectation, with several buyers saying that formal certification will become a requirement in the future.

Any differences between sectors and sizes

Some compliance needs are very sector specific. Food hygiene standards in the food packaging sector, for example, security for security printing, and data protection (and security, to an extent) for direct mail. Others spread across all sectors but were notably stronger in some.

-  Publishing, both books and magazines, has particular concerns about paper, as do Government, direct mail and a number of major corporate companies.
-  General environmental issues were in the main more important to Public Sector buyers and major corporates.

- 🌈 Colour management and standardised printing conditions tend to be more likely as a requirement for larger organisations producing a wide variety of printed materials with a requirement to match – a corporate colour, perhaps, or particular images – or for overall consistency.
- 🌈 Social and ethical standards were more likely to be required by companies with supply chains extending outside of Europe.

When analysing the responses of those who had marked compliance as an important selection criterion, most were from large organisations. The smaller buyer for whom this was important tended to be from agencies, and so keeping to the requirements of their customers.

Summary

It appears that having measurable standards is increasingly important. The larger organisations are those currently most likely to demand such standards, but not the only – so knowing your customer is again invaluable. Learning about their market sector can help with predicting what is likely to be important when approaching a prospective new customer.

★ Key message for printers ★

★ Compliance to a variety of standards will become more important


The bottom line


The print buyers interviewed were not buying a product – they were buying a service, and they evaluate a printer by how this service is delivered.

 Quality of product is a given

Buyers expect any serious printer to be able to deliver commercially acceptable quality. It only becomes a differentiating factor for the high-end work: report and accounts work, automotive industry, corporate brochures and catalogues for other premium products. Here the design market comes into play as well – they are small buyers mostly, but highly demanding in terms of quality. Otherwise, suitable quality is assumed to be the norm.

Where there are any quality issues on a job, the service element comes into play again, with buyers expecting the printer to

 find out why, and

 to put measures in place to prevent it from happening again

- in addition to putting things right.

Very few buyers, as would be expected, mentioned having quality issues with their printed products – the main areas highlighted where they would like to see changes were in customer service, communications, deliveries and administration – the service areas.

From the small office buyer buying looking to publicise their event or company, to the major corporate doing the same thing on a larger scale, to the publisher buying a means of getting their product - the magazine or book - to market in the most effective way, they are all buying a service. The only thing that differs is the type of service and the degree of handholding.

All are buying in expertise, advice and project management, whether of the various process phases of an individual item (book, catalogue, magazine or even just a letterhead) or a complex point of sale or direct mail project. That the finished product is a printed item is almost by the way. The quality, delivery on time and technical support needed to achieve these are a given. What counts is how you get there – is the journey smooth or difficult?




The price is negotiable. Buyers are not looking for the cheapest price, they are looking for best value for money. However, as in any other aspect of purchasing, they are expected to keep prices down and will use their best efforts to do so.

Generalisations across category of work purchased or size are possible in certain areas – in those cases very definite trends were showing themselves. But these generalisations are just that – in almost every case where there was a strong trend, there was also an exception. This clearly demonstrates that getting to know the customer is the most important first step to providing the levels of customer service, communication, the type of relationship and technical service that customer is looking for. Understanding the general trends gives a good starting point, and will help with knowing how to engage the interest of new customers.

How buyers evaluate a prospective printer

Getting their interest

What seems to best engage a buyer's interest and make them willing to talk to a printer approaching them for business is how personalised the approach is.

-  Does the printer know what their business is and what their organisation is trying to achieve with their use of printed material?
-  Does the printer understand how what they can provide fits into this?
-  Is the printer offering them a means to better achieve their own targets or the goals of their company, or simply selling them print?

This appears to apply regardless of buyer size or category.

The office administrator who needs to buy the company stationery or conference materials or promotional literature, in addition to doing their 'day job', is more likely to welcome the printer who comes in knowing the types of work they are likely to be doing and the difficulties it can give an inexperienced buyer. The printer who offers "Just tell us what you want to achieve and we will give you suggestions of what to print for it, work with you to get the most from your budget, help you put it together, and make sure everything gets there on time".

The major buyer is equally more inclined to welcome the printer who demonstrates understanding of how their business works, and has ideas of how they can add value: improvements in distribution or stock level management, working with them to develop more cost-effective formats or to create more effective workflows.

The assessment phase

The buyers interviewed looked at a range of topics, depending on the nature of their work. The degree of sophistication of requirements tends to increase according to the volumes of work placed, but not always. Some quite buyers with relatively small budgets looked quite deeply into the printer's business. Areas looked at include:

- 🌈 Plant: suitability for the type of work being considered, anything that differentiates this printer from competitors
- 🌈 Capacity (for large buyers): ability to absorb their proposed volumes of work
- 🌈 Quality control: what systems are in place to check and maintain quality
- 🌈 Colour management: the degree of this expected by buyers varies considerably, and is not necessarily related to size. It can include a fully colour-managed workflow, using ICC colour profiles and calibration of all equipment from pre-press onwards, operating according to ISO 12647, or be much simpler. The general requirement is predictability – that the proof will match what they see on screen, that the job will match the proof, and that re-prints will match each other. For many customers, they also want to be sure that their corporate colour will match across all their printed material regardless of who prints it.
- 🌈 Customer service structure: how it's set up, experience and expertise of customer service staff, training, systems in place for handovers, how much authority the customer service staff have.
- 🌈 Transactional infrastructure: this can, depending on the buyer, include:
 - web-enabled estimating
 - systems for file transfer and remote proofing,
 - management information systems that the buyer's organisation can link into for job tracking,
 - e-commerce systems
- 🌈 Compliance with any policies or standards required by that particular buyer's organisation or, for agency buyers, their customer. These may simply be policies, informal (uncertified) standards or formal, certified standards. The list of formal standards includes colour management (ISO 12647), quality management (ISO 9001), environmental management (ISO 14001), health and safety (OHSAS 18001) or social and ethical standards (SA 8000). Standards, whether externally certified or not, are considered to show good organisational structure and ways of working. One interviewee stated that "Having any of the standards shows that a printer has good systems in place, shows awareness of the importance of

controlled systems”. There are also various specific requirements related to the type of work, such as hygiene or security.

- 🌈 Contingency planning: what will they do to make sure the work still gets done if they have a breakdown
- 🌈 Track record of similar types of work

Those who were familiar with the draft of the new Publicly Available Specification, PAS 75, developed by BPIF and BSI felt that this would offer a significant degree of assurance that those areas they considered important were being managed in an effective way.

What makes buyers continue working with a printer

This is far simpler – good customer service. Being consistent, reliable, responsive, helpful and **always** doing what they say they will do. Communicating well and working with the customer to resolve any problems. Pro-activity to help the buyer better achieve their organisation’s goals. When these areas are right, a good, lasting relationship can be built, but it needs to be worked at. Attention to detail right the way from start to finish of a project was considered important by many of the buyers, and this includes the administrative details: following delivery instructions accurately, ensuring proofs of delivery and file copies are available as and when requested, and ensuring that the financial paperwork is right – both estimates and invoices.

Buyers realised that things will go wrong sometimes, but what was important, and made the difference of whether or not they were willing to carry on working with the printer, was how they resolved problems. Early warning was very important, and a pro-active “let’s get this sorted out” attitude.

What gets more work

The final deciding factor for each job very definitely appears to be cost in the majority of cases, but that does **not** mean that buyers are looking for the cheapest price. They are looking for competitive pricing against a certain standard of quality and service. Those interviewed said they were fully aware they could buy more cheaply by going to printers outside their formal or informal preferred supplier list, but that is not what they are looking for.

Jobs would be put to quote with selected printers, for whom the other attributes were known and considered suitable for the work, and the job awarded to the printer who offered the most competitive price. This could be achieved using a different approach to the original specification – so perhaps a more competitive solution rather than a

keener price against that specification – but price is usually the deciding factor. On occasion, a printer with a slighter dearer price may win the work because of logistics, a stronger service offering, or that printer being able to offer better scheduling, but only very rarely.

Improved pricing was strongly indicated as something that would gain more work for preferred suppliers (see Appendix D).

How the Assessment Questionnaire will help




Stepping back and taking a look at how your company is working is not easy. This is well recognised, and the reason many organisations use external consultants to help them take a fresh look at the way they are working. Budgets, however, may not allow for this, so a questionnaire that is carefully structured can help. Breaking down the areas to examine, and asking specific questions to point out what to look for in them helps the review process, and giving examples offers a benchmark to help make answers as objective as possible.

Using the questionnaire for 360° feedback gives the most benefit of all. This involves doing a self-assessment and also asking your customers to answer the same questions.

Customers can often find it difficult to say when things aren't quite working well, especially if they are small things that they think might appear to be being picky, or if they are concerned that comments will be taken as a criticism of a person who they know is doing their best, when it's actually the system that's at fault. Giving them an opportunity to comment on performance in an objective way makes it easier, and encourages them to let you know of anything that needs attention before it starts creating a risk of them being tempted away by a competitor.

For similar reasons, it is much easier for a customer to be frank when they know that their comments will be anonymous – another advantage of using third parties for surveys. For this questionnaire, we've kept anonymity by not asking for names and by just having boxes to tick.

Gathering together answers from all your main customers, and comparing it with your own answers, gives you three things:

-  You can see any areas where there is general dissatisfaction – so you know where you perhaps need to change a way of working;
-  You can see anything that only affects one customer, which may indicate a need to spend some time learning more about that customer and their work, or a need for more training for the contact staff dealing with that customer, or even something as simple as a personality clash
-  You can see if there is anything where what your customers say differs from what you were expecting – areas where you need to be watching what's going on more, as you are not seeing the whole picture

The feedback section is a compilation of opinions, comments and suggestions by a wide range of print buyers. It is planned to give some practical ideas of what you can do, and to get you thinking. They are a basis to build on rather than a recipe in themselves.

Appendix A: Methodology


The starting point for the research was that Vision in Print's Customer Strategic Advisory Group wanted to create an assessment tool that would be valuable to all types of printer, regardless of the type of work they produced. It was to be freely available, downloadable from the Vision in Print website, so that all printers could have access to it. It should particularly help those smaller printers for whom budget constraints preclude external customer satisfaction survey consultants.

Finding the buyers to survey

To achieve the stated aim, we needed to ensure we surveyed all types of buyer. As the aim of the project was to let printers know what different buyers look for in a 'good printer', we focused on buying sectors. Analysing these, to see if buyers from the various sectors had differing requirements, could offer further useful information. We also looked at size of buyer to see if this changes requirements. Those with large budgets, buying print as their full time role, with a number of print buyers working for them, were likely to approach things in a different way to a buyer working in a smaller organisation with a lesser budget and no supporting staff. And of course, someone buying print as just a small part of their main role would have different needs yet again. We therefore created the matrix shown below with the Steering Group.

MAIN TYPE OF WORK PURCHASED	LARGE	MEDIUM	SMALL
Point of sale	£0.5M+	£50K - £0.5M	<£50K
General commercial (including corporate literature)	£5M+	£0.5 – 5M	<£0.5M
Magazines & periodicals	£2M+	£0.5 – 2M	<£0.5M
Books	£5M+	£1 – 5M	<£1M
Packaging & labels	£0.5M+	£50K - £0.5M	<£50K
Direct mail	£2.5M+	£0.5 – 2.5M	<£0.5M
Catalogues	£5M+	£1 – 5M	<£1M

Finding this wide range of print buyers, with a large enough number of them to be statistically meaningful, was obviously challenging. So we used three approaches.

-  The Steering Group, made up of members of ViP's Customer Strategic Advisory Group, volunteered to take part and also to recruit a number of buyers each from among their colleagues and acquaintances.

- 🌈 We approached three printers, in completely different markets, and asked if they would be prepared to allow us to conduct a survey among their regular customers. They supplied a customer list, and we selected from them to fill the buyer matrix drawn up.
- 🌈 Finally, we also called for volunteers. Opportunities to do this were provided by two conferences and by the support of the trade press.

We had originally included stationery buyers in our matrix, but were unable to find any buyers from our groups who classified themselves as stationery buyers. We therefore carried out some additional interviews to explore this. We discovered that the stationery buyer is a dying breed. Stationery is easily purchased online by smaller companies as just a part of someone's job, or outsourced to specialist stationery providers in larger companies. In many places, it is now included with general commercial print buying, or general purchasing. In the former case, a printer is then frequently chosen who can also supply general commercial colour printing.

Choosing the research method

There were three things we wanted to find out:

- 🌈 What buyers look for when selecting a printer
- 🌈 What makes them continue to use that printer
- 🌈 What encourages them to give that printer more work.

We therefore used two quite different approaches, both using questions developed with the Steering Group (Appendix B). One, the InfoQuest survey, which will be explained in more detail in the next section, was essentially a customer satisfaction survey. The difference was that we were combining results from buyers using a large number of printers, and asking the questions in two ways:

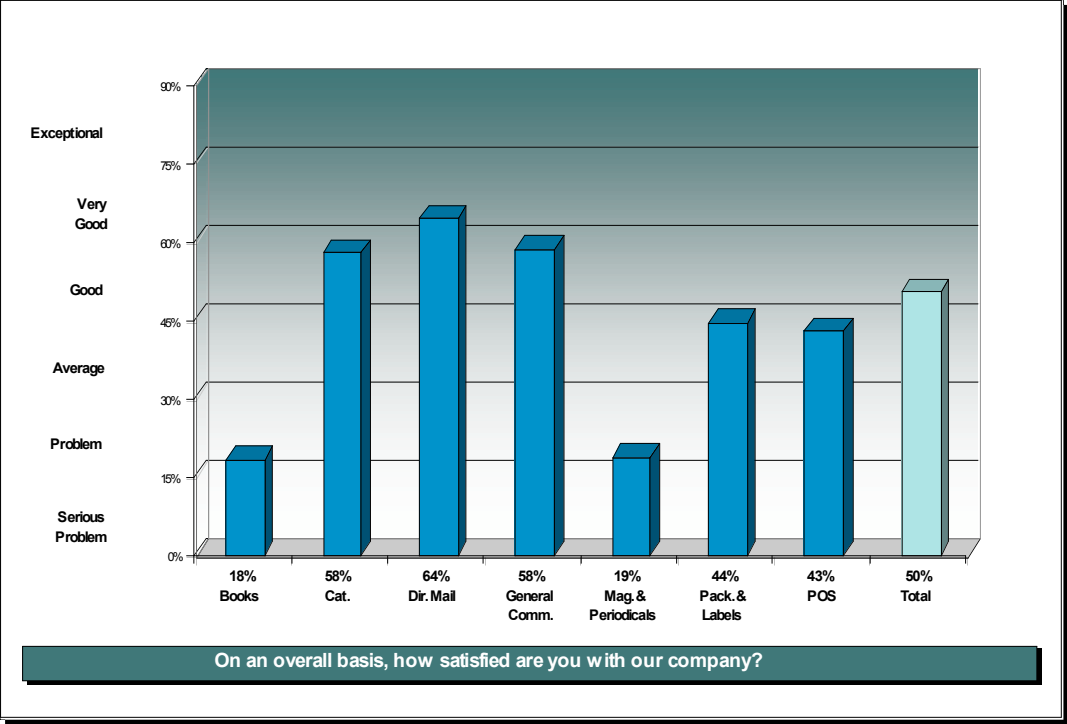
- 🌈 For buyers nominated by the Steering Group and our volunteer buyers, we asked them to answer with their preferred supplier in mind.
- 🌈 For customers of our volunteer printers, we asked them to reply with their opinions of that printer. We felt that as they were regular customers of that printer in a very competitive market place, we needed to know what was good about that printer.

This was to let us know what caused buyers to stay working with a printer. We felt that those attributes with which the buyers were very satisfied would be those that were important to them. Conversely, areas where buyers were less satisfied would presumably be less important, since that supplier was still a preferred supplier. Three

introductory questions allowed us to check that we were surveying amongst generally satisfied customers, and the results of these are shown in the following graphs.

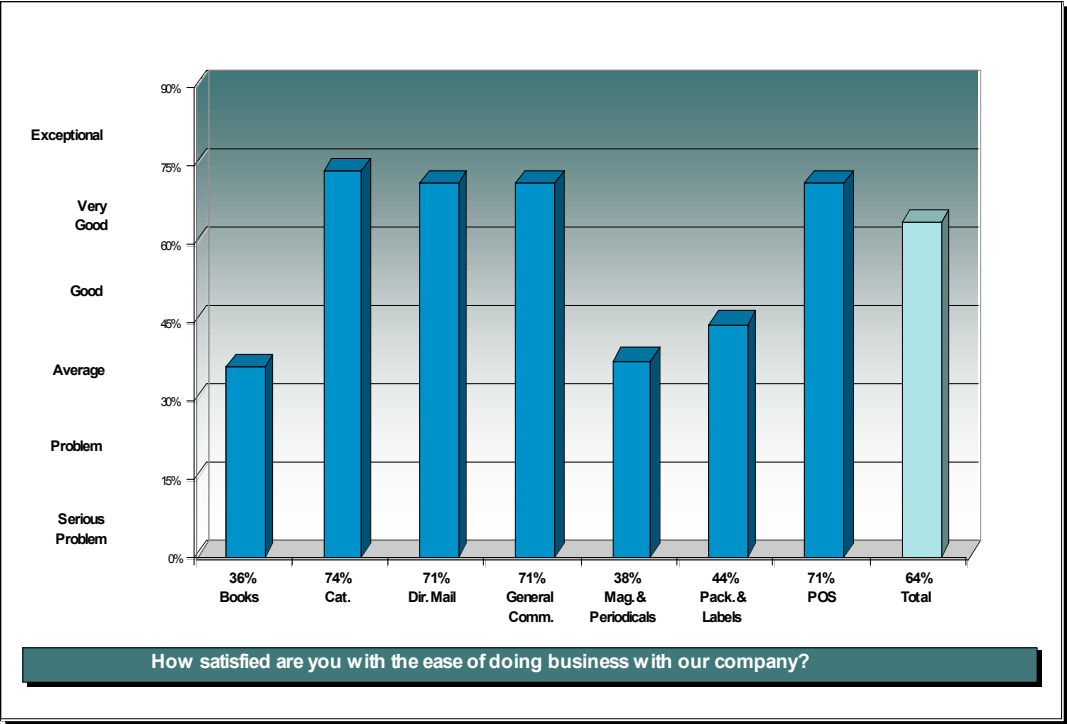
Overall Satisfaction

The chart below illustrates the percentage of respondents who are Totally Satisfied.



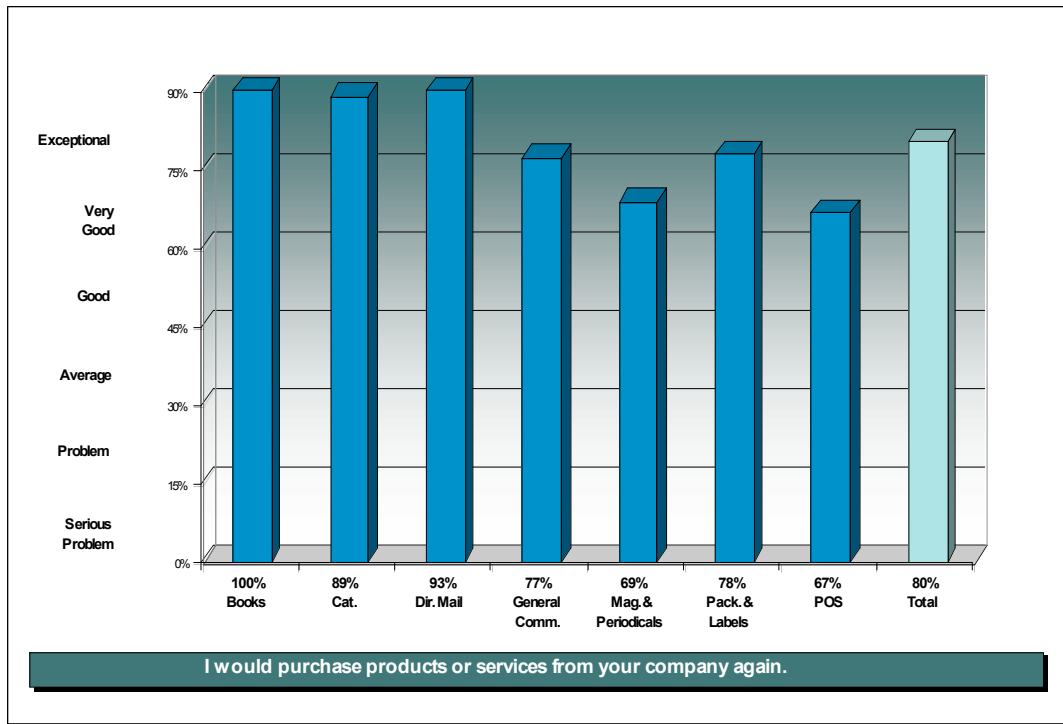
Ease of Doing Business

The chart below illustrates the percentage of respondents who are Totally Satisfied.



Customer Loyalty

The chart below illustrates the percentage of respondents who Fully Agree.

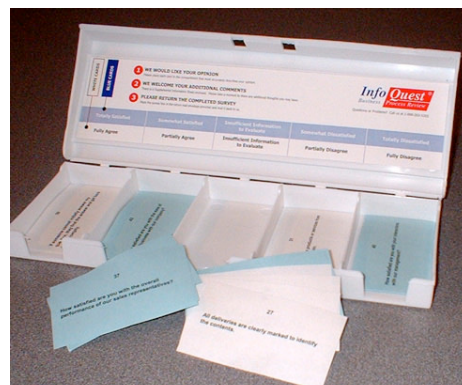


As you can see, overwhelmingly the respondents would use that company again – perhaps the acid test. Interestingly, the magazine and book publishing buyers who took part, and who had very low satisfaction levels, were ‘direct’ buyers, not from a printer customer list, and so were replying about their preferred supplier. The contradictory result of low satisfaction yet 100% of book publishers who would purchase again from that supplier may be explained by the lack of competition in this market in the UK.

By using a customer satisfaction type of survey, and InfoQuest’s unique method, the responses were of a more instinctive nature, and thus more telling.

InfoQuest

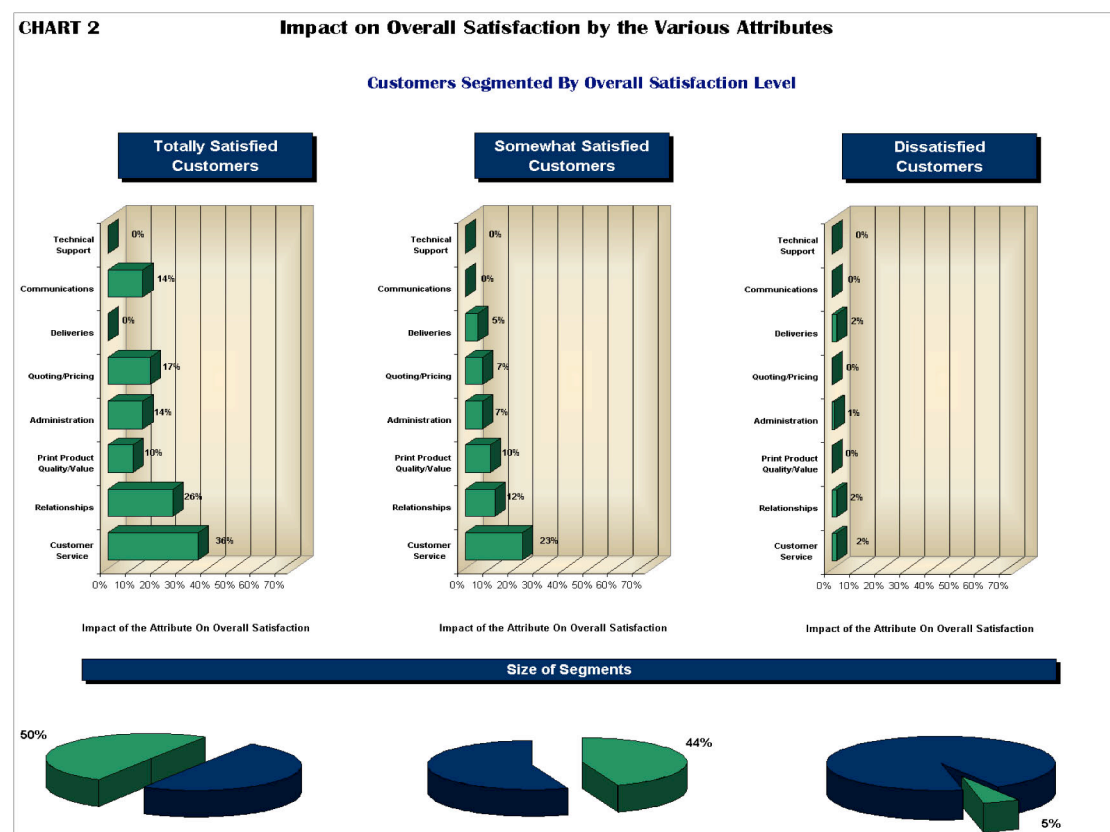
InfoQuest are an international specialist in customer satisfaction surveys. Their response mechanism is a box, as shown in the picture, with slots in which to drop cards printed with the questions. You choose the slot according to your response.



This has several benefits:

- It prevents respondents falling into a pattern – because they are unable to see their previous responses so easily.
- It is approachable. It resembles a game, and is easily and quickly done while having a cup of tea.
- Being three dimensional, it is far less likely to be buried under the mound of paperwork that accumulates on the desks of so many of us.

Responses are analysed using neural network analysis – an artificial intelligence computer programme. We therefore were able not only to see an analysis of which attributes gave rise to greater or lesser degrees of satisfaction (the details of which are included in the appendices for each topic area), but also an analysis of the degree of impact various attributes had on satisfaction, as can be seen on the following chart.



Written survey

The second method was a written survey, which we included with the InfoQuest box. In this, we asked buyers to score attributes according to their importance when selecting a printer. A written survey elicits a more considered response, but is

appropriate for gaining information about supplier selection, which is a more considered process. Many of those attributes that make a buyer feel instinctively comfortable with a regular supplier cannot be assessed prior to working with them.

We also asked a number of questions, both to gain more in-depth information, and to gather information for the Assessment Questionnaire (Appendix C).

Finally, we interviewed buyers taken from among our respondents. This was again in two phases, the first while we were still information gathering and the second to explore in more depth the results from the InfoQuest analysis.

Preparing the questionnaire and feedback

Once the written surveys were received, and the interviews carried out, all the comments were collated and related to the topic areas. Many comments naturally applied to more than one, so a statistical analysis of the comments would not work. There is also a degree of subjectivity in working out which topic area a comment applies to.

We then reviewed all the comments within a topic area to see if they fell into natural clusters – these indicated what the questionnaire should cover. As the questionnaire is planned to be used by either the printer assessing themselves, or by the printer's customer replying about the printer, the phrasing of the questions had to cover both options. The comments were also used to provide the feedback section for the Assessment Questionnaire, and to provide indicators at the beginning of each section for the printer to benchmark against and thus help them reply.

Appendix B: InfoQuest survey questions

Respondents were asked to respond to the following questions and statements, with options of 'Totally satisfied', 'Somewhat Satisfied', 'Somewhat dissatisfied' or 'Totally dissatisfied' for the questions and 'Fully agree', 'Somewhat agree', 'Somewhat disagree', or 'Fully disagree' for the statements.

Category: overall
On an overall basis, how satisfied are you with our company? How satisfied are you with the ease of doing business with our company? I would purchase products or services from your company again. I would recommend your company to an associate.
Category: Print product quality/value
How satisfied are you with the value we deliver? Print purchased consistently meets specifications Your printed work represents excellent value for money Quality issues are resolved promptly
Category: Product/services range
How satisfied are you with the range of print services we provide? Your products and services meet my needs Your diversity of products and services is an advantage to me I would like you to offer greater innovation in added value services
Category: Customer service
How satisfied are you with our overall service level? Your people listen attentively and answer my questions My needs are addressed promptly and efficiently Your people are helpful if I have a problem
Category: Relationships
How satisfied are you with your relationship with our company? I think of your company first whenever I have a relevant printing need I prefer to buy print from your company I know your people can be trusted to meet my needs
Category: Administration
How satisfied are you with our general administration? Ordering from your company is an easy process Invoices from your company are complete and accurate Invoice queries are handled efficiently
Category: Quoting/pricing
How satisfied are you with our pricing? Your quotations are produced promptly and accurately You consistently offer competitive print solutions Your company is flexible when we need to make changes to orders
Category: Communications
How satisfied are you with the way our company communicates? Your people regularly stay in touch with me Your company keeps me fully informed Your internal communications share knowledge of my business appropriately
Category: Deliveries
How satisfied are you that we meet your needs for prompt delivery? Your deliveries arrive when promised Deliveries always arrive with appropriate documents Deliveries arrive in good condition

Category: Technical support

How satisfied are you with our technical support?
Your company provides all the technical support I need
I believe your company will continuously develop technical excellence
I believe your company has the resources to help us with all technical issues.

Category: Customer awareness

How satisfied are you with our awareness of your business issues?
You demonstrate a pro-active approach to my business
You help us add value to our business
You show a good understanding of the drivers and dynamics of my market.

Category: Compliance

How satisfied are you with our compliance with relevant industry requirements? (e.g. hygiene, data, environment standards)
You fully meet our compliance needs
You are suitably reactive, adapting as compliance needs change
You are pro-active and anticipate forthcoming compliance requirements

Appendix C: Written survey

Supplementary Questions

Now please go through the enclosed 'pack' of questions, and put them in the appropriate section of the box according to whether your answer is Totally Satisfied, Totally Dissatisfied etc, or Fully Agree, or Partially Disagree or Insufficient information etc, as indicated inside the box lid.

When you have completed the questions in the box, please come back and answer the following questions, before posting the box back to us free of charge.

a. Are there other important issues, not covered by these questions, that determine in your own mind what makes a good printer? If so, please give details below:

b. What is one thing this printer does particularly well that helps make them a preferred supplier?

c. What is one thing that, if improved, would encourage you to give this printer more work?

d. The following matrix will help us to understand how you rank the relevant importance of the following elements when selecting a printer. If there are important criteria we have missed out, please add these in under 'Others' in the last box:

Simply tick the relevant box: 1 = Low importance; 5 = High importance

Element	1	2	3	4	5
Timely deliveries					
Good communication					
Technical support					
Range of products/services					
Knowledge/awareness of your market					
Customer service level					
Product quality/value for money					
Efficient quoting					
Good administration					
Close business relationships					
Compliance (e.g. data security, environment, health & safety standards, etc)					
OTHERS? (please specify)					
1.					
2.					
3.					

Very many thanks for all your help. Your contributions are much appreciated.



Supplemental Information Form

Thank you for agreeing to help us with this important research project. Your feedback will be used anonymously to guide the whole UK print industry through this Df-funded Vision in Print project called 'What makes a good printer?' Key outputs of this research will be made available on the VIP website once the project is completed.

When answering the questions in this survey, please answer as if you were describing one unnamed, preferred, key print supplier.

Many thanks again for your cooperation.

Richard Gray
Chief Executive, Vision in Print

Questions or Problems?
Call us on: 08000 717 717

1. What would you consider to be the most significant single action this printer could take to enhance their value to you as a service provider?

2. Any additional comments you care to offer:

If we would like to discuss your comments or responses, may we contact you? YES/NO

Name: _____ Job Title: _____

Company: _____ Telephone: _____

Email: _____ Fax: _____

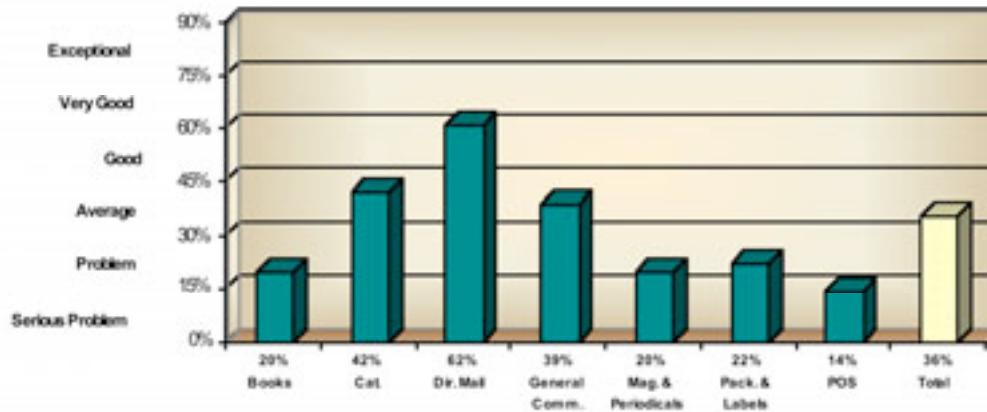
Address: _____

Town: _____ Postcode: _____

County: _____ Country: _____

Appendix D: Product quality/Value for money

Print Product Quality/Value

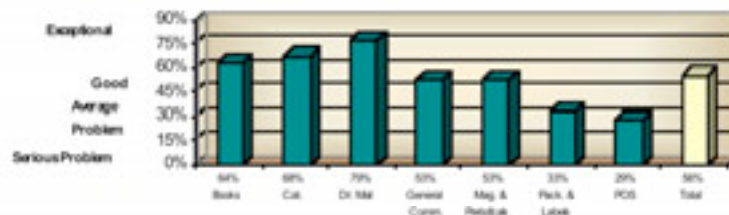


How satisfied are you with the value we deliver?

The chart above illustrates the percentage of respondents who are Totally Satisfied.

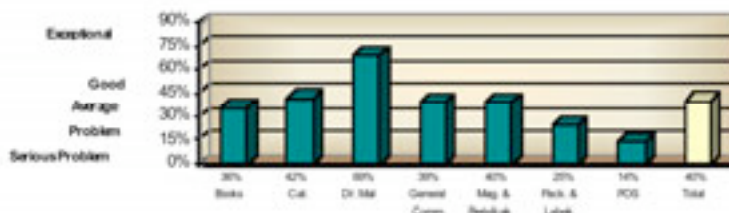
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



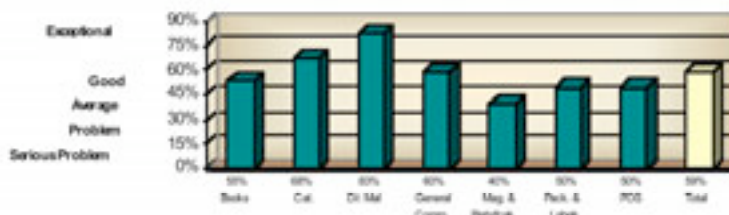
Print purchased consistently meets specifications.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Your printed work represents excellent value for money.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Quality issues are resolved promptly.

The first graph shows that only an average number of buyers are totally satisfied with the value their printers deliver– suggesting that satisfaction with this area is not the main reason that the printers about whom they were responding are preferred suppliers.

The results from the three sub-questions showed more detail – which aspects of value are important.

🌈 56% of buyers fully agreed that *“Print purchased consistently meets specifications”*,

🌈 59% fully agreed that *“Quality issues are resolved promptly”*

– both good scores.

What brought the overall percentage down was perhaps that only 40% of buyers were in full agreement with the statement that *“Your printed work represents excellent value for money”*. So the indication, perhaps not surprisingly, is that buyers are giving their regular work to printers who provide the standard of work required and resolve quality issues promptly, but they would prefer their prices to be lower.

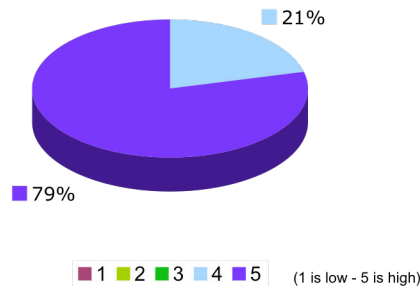
The overall impact on satisfaction levels of product quality and value is 10% - it is not an area where improvements will have best effect.

Sectoral differences

The greatest variants across the sectors were in Direct Mail, where all three sub-questions had high percentages in full agreement – ranging from 69% to 83%. This was considered by buyers to be a very competitive market place, frequently with high volumes and standard items, which could bring overall costs down, and good opportunities for printers to add value by suggesting formats. It is also an area where results can be easily measured, so the benefit of additional costs for a particular format can be seen in terms of response levels.

Lowest levels of satisfaction for value for money were in Point of Sale. Various reasons were put forward for this: a limited marketplace, the nature of the designs – often completely new formats requiring proto-typing and making dies, adding very high origination costs, and the project-based nature of the work.

How do you rank the relative importance of Product Quality/Value for Money when selecting a printer?



Written survey

The written survey, as explained earlier, was intended to capture information about what buyers consider when choosing a printer. The responses to the question asking buyers to rank topics from 1 to 5 show 79% of buyers ranking product quality and value as 5 and 21% as 4. No one ranked it below 4.

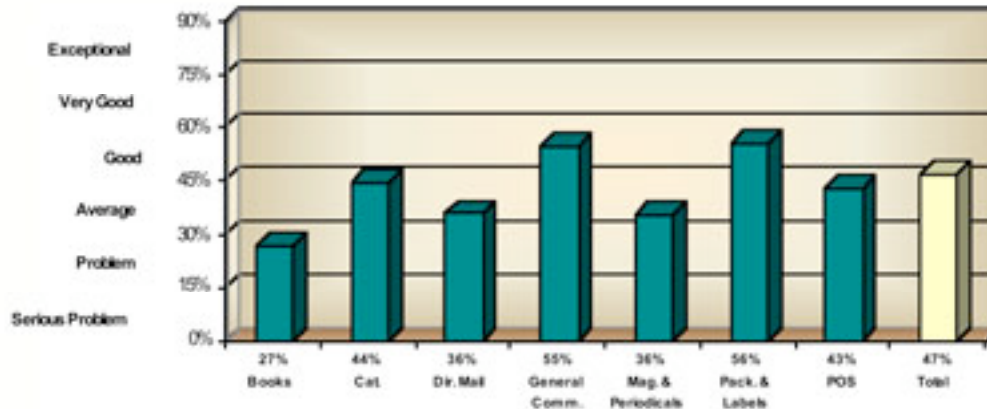
The written questions showed an interesting progression:

- The question *“What is the one thing this printer does particularly well that helps make them a preferred supplier?”* had 37 answers (out of a total of 114 written surveys with replies to that question) which included a mention of price, value or quality – of which 9 comments were solely related to quality and 5 to price.
- When it came to asking buyers *“What is the one thing that, if improved, would encourage you to give this printer more work?”* 41 answers included mention of product quality or value for money, and a total of 28 responses were just price. Only 4 related to just quality, implying that quality of product is not what holds buyers back.
- However, looking at *“What would you consider to be the most significant single action this printer could take to enhance their value to you as a service provider?”* the price-only comments dropped back down to just 15 out of a total of 33 comments related to this area, and only 4 pure quality, all others including additional topic areas.

Interview findings supported this: buyers effectively work on two tiers. There is a certain set of criteria required for a printer to get on to the formal or informal preferred supplier list, and to remain on it. Fulfilling other criteria enhances value, and opens up opportunities to quote. But, at the end of the day, what wins the work is price.

Appendix E: Products/Services Range

Products/Services Range

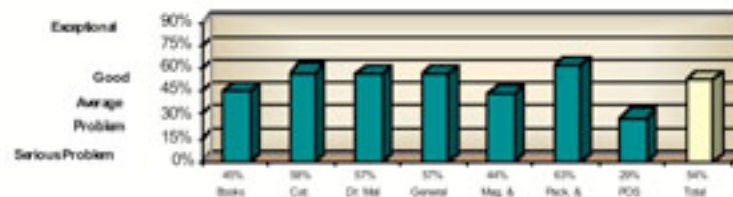


How satisfied are you with the range of print services we provide?

The chart above illustrates the percentage of respondents who are Totally Satisfied.

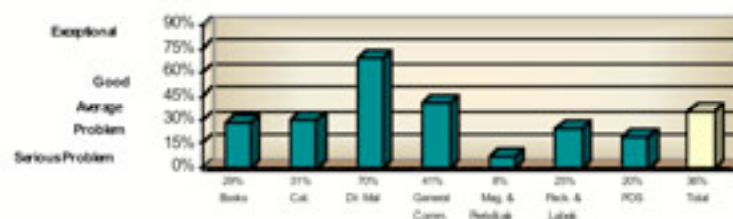
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



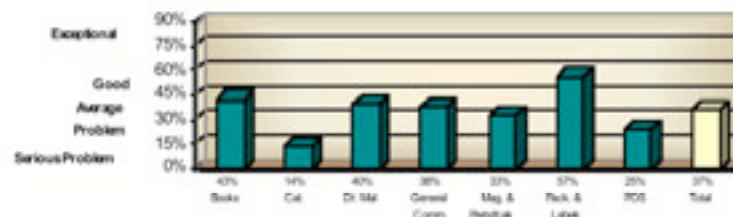
Your products and services meet my needs.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Your diversity of products and services is an advantage to me.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



I would like you to offer greater innovation in added value services.

Buyers generally seem to look for printers who offer specific products or services that they want, and don't expect a broad range of offerings. As you can see from the graphs, they are pretty evenly satisfied with what their chosen printers offer.

Asked to comment on the statement *"Your products and services meet my needs"*, the range of those who fully agree is still fairly similar.

When asked about innovation, 37% of buyers fully agreed that they would like their printers to offer greater innovation in added value services, peaking at 57% in the packaging and labels sector.

Sectoral differences

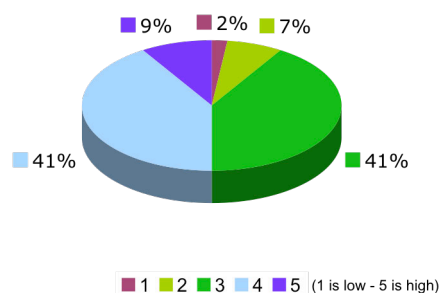
When it comes to looking for a diverse range of products or services, direct mail buyers very much stand out as those to whom it is most important. The reasons for this are very understandable:

- Much direct mail includes a variety of different types of work in one pack - letter, leaflets, envelopes, response devices – and varying types of personalisation.
- Many direct mail buyers work for small to medium sized agencies, where their workload doesn't allow time for buying all the items and services separately and project-managing them.

Magazine publishers are the least interested in a diverse range – again for very understandable reasons.

Packaging buyers look for innovation in packaging design from their printers - new ideas for construction, for example – and regard this as an important service. Food hygiene rules restrict outsourcing by food packaging printers.

How do you rank the relative importance of range of products and services when selecting a printer?



Written survey

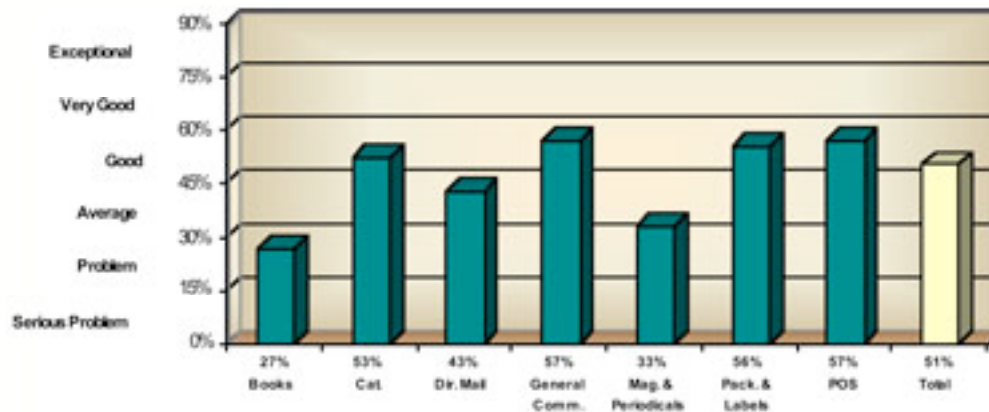
This survey showed that diversity is not something buyers look for when choosing a printer. When asked to score 'Range of products/services for importance, only 9% gave it the maximum score of 5, and half of the buyers scored it 3 or less, as can be seen from the chart.

The comments on the survey sheet echoed this, with only five buyers having chosen their preferred printer because of the range of products and services they offered. However:

- 🌈 In answering the question *“What is the one thing that, if improved, would encourage you to give this printer more work?”* fifteen replies were related to this area. Many were simply looking for extra capacity: more or bigger presses, additional bindery. All others related more to extending service: online submission of files, for example.
- 🌈 Answers to the question *“What would you consider to be the most significant single action this printer could take to enhance their value to you as a service provider?”* also included adding presses, but mostly focused on improving file transfer, online proofing (very popular) and more accurate digital proofing. Eighteen of the responses included mention of product or service range.

Appendix F: Customer service

Customer Service

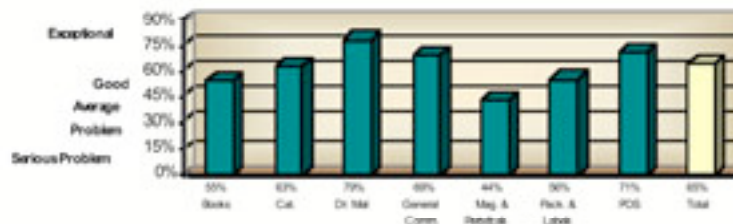


How satisfied are you with our overall service level?

The chart above illustrates the percentage of respondents who are Totally Satisfied.

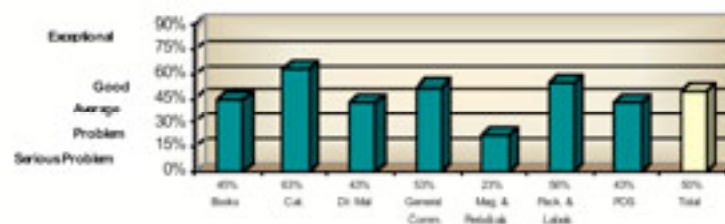
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



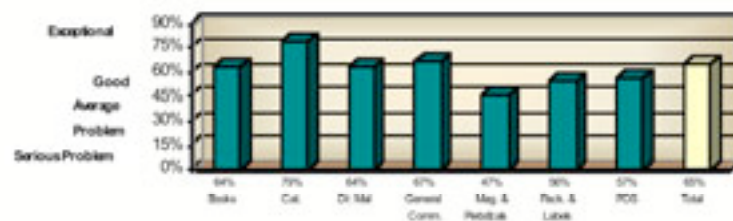
Your people listen attentively and answer my questions.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



My needs are addressed promptly and efficiently.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Your people are helpful if I have a problem.

Customer service came out very strongly as the most important element for keeping customers happy. It can be taken as the main reason for the buyers in the survey staying with the printers they had in mind when responding.

The impact of customer service on overall satisfaction was 36% - the highest of all the topic areas researched.

What we learned are that the buyers:

- Like their printers to be helpful if they have a problem – 65% fully agreed their preferred suppliers were
- Like printers whose staff listen attentively and are responsive to their needs – 65% fully agreed their printers did this
- Like printers who respond promptly and efficiently to their needs – although many feel they are not quite prompt enough. There was only 50% full agreement with this statement, and written comments and interviews suggested that promptness was the letdown.

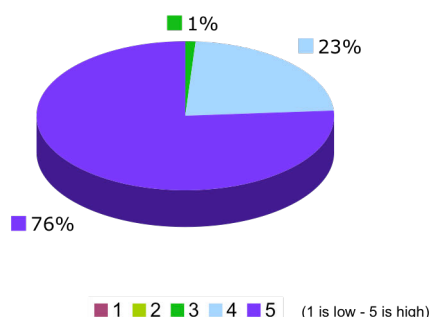
Sectoral differences

Responses to the questions were relatively even across the categories, but with a couple of interesting exceptions.

The graphs show responses to the statement “*My needs are addressed promptly and efficiently*” have a big drop for magazines.

The other questions had answers mainly in the ‘good’ or ‘very good’ range – but with magazines just slightly lower than the others. In the interviews with magazine publishers, the main issue here appears to be responsiveness: they need swift reactions.

How do you rank the relative importance of customer service when selecting a printer?



Written survey

When ranking the importance of customer service, the findings here showed very strongly that good customer service is what buyers are looking for when choosing a printer. 99% of buyers ranked this either 4 or 5.

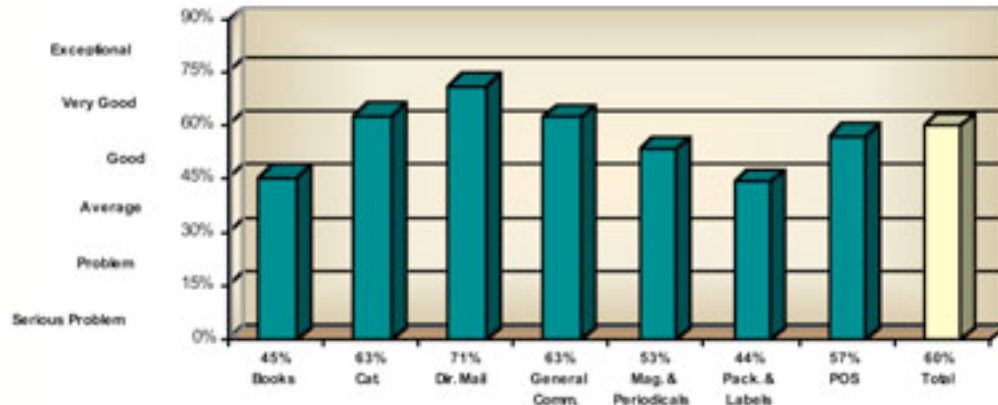
The survey comments emphatically supported this.

- 🌈 In answer to the question *“What is the one thing this printer does particularly well that helps make them a preferred supplier?”* forty one of the comments talked about customer service as either all or part of the reason – the highest number of all topics.
- 🌈 For the other two questions, asking what would enhance their value and what would gain them more work, the numbers of mentions were very low – seven and five respectively,

This strongly implies that a preferred supplier is chosen for their customer service, and if they don't get it right, buyers tend not to continue working with them.

Appendix G: Relationships

Relationships

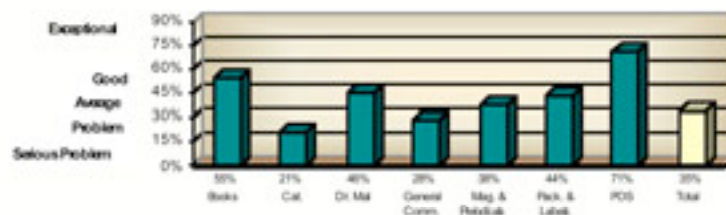


How satisfied are you with your relationship with our company?

The chart above illustrates the percentage of respondents who are Totally Satisfied.

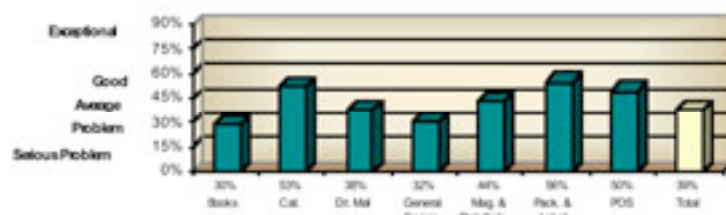
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



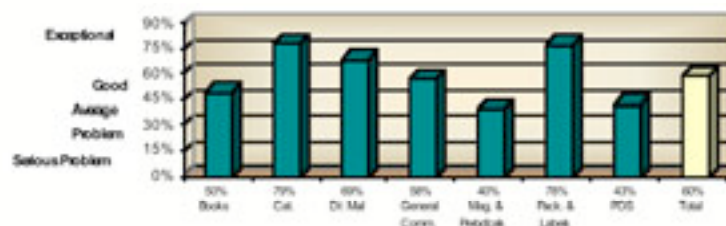
I think of your company first whenever I have a relevant printing need.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



I prefer to buy print from your company.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



I know your people can be trusted to meet my needs.

- Relationships have the second highest impact on customer satisfaction after customer service, at 26%.
- Buyers stay with those with whom they have a good relationship – 60% of buyers were totally satisfied with the relationship with their preferred supplier, which falls into the 'very good' category.
- 60% of buyers fully agreed that they could trust their printer's people to meet their needs.

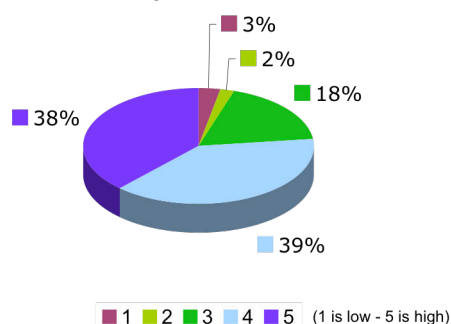
The other two questions were those that usually go together with a good relationship and trust to meet a customers needs, and gave answers that, on first sight, were unexpected.

- Only 35% of buyers thought of the printer they were answering about whenever they have a relevant printing need
- Only 39% of buyers prefer to buy print from that company

Exploring this in the interviews, and looking at the breakdowns across categories, provided some answers.

Most buyers have a list of preferred suppliers, and ask several from the list to quote on each job. They do not think of any one supplier first, but a group. Others, and these include the categories that were more likely to think of that supplier first, work on long-term contracts or have a limited number of suppliers able to do their type of work.

How do you rank the relative importance of close Relationships when selecting a printer?



Written surveys

Relationships cannot be a selection criterion, since no evaluation of relationship is possible until the companies have started working together. This showed in the ranking survey, where this topic was marked quite low.

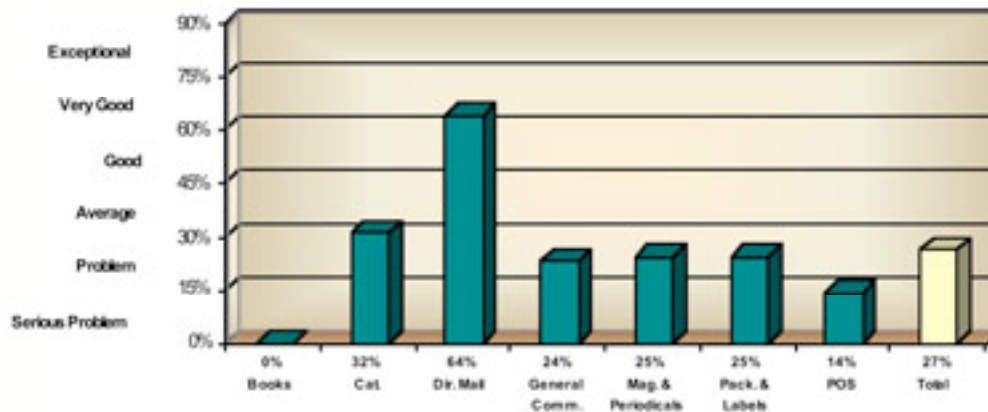
The comments showed that it **is** something that buyers look for when working with a printer:

- nine respondents cited relationships as an important issue that, to them, makes a good printer

- seven included their working relationship as one of the reasons that the printer concerned was a preferred supplier.

Appendix H: Estimating, administration and invoicing

Quoting/Pricing

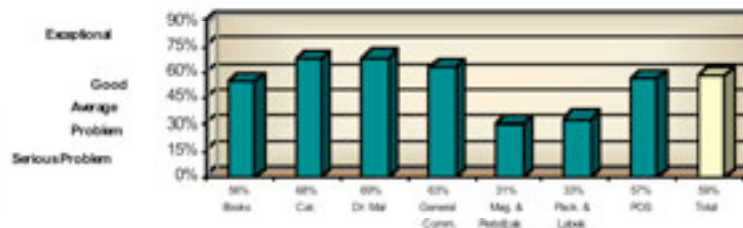


How satisfied are you with our pricing?

The chart above illustrates the percentage of respondents who are Totally Satisfied.

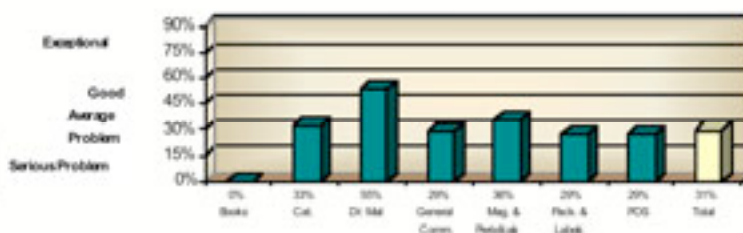
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



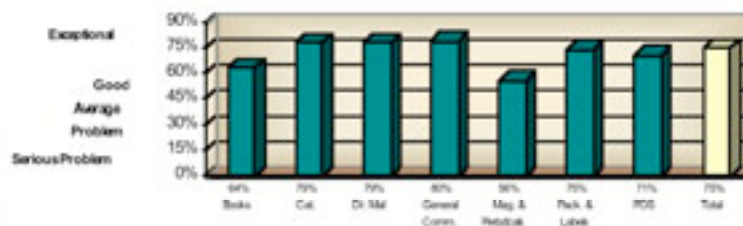
Your quotations are produced promptly and accurately.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



You consistently offer competitive print solutions.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Your company is flexible when we need to make changes to orders.

The graphs on the quoting process shows that the preferred suppliers of our respondents are almost all very good at being flexible when changes to orders are needed. Flexibility was also a comment frequently mentioned on the written surveys as a valued attribute in a printer. We additionally see that their printers are pretty good at producing prompt and accurate quotations: the two low scores are for sectors where this is not so relevant:

- 🌈 magazine publishers do not tend to have a requirement for quick turnaround of quotes, because of the nature of the contracts with their printers
- 🌈 packaging buyers from the larger retailers, whilst being involved in the selection of printers and specification of packaging, do not necessarily get involved in the commercial aspect of purchasing – that will tend to be the province of the food manufacturer or packer, as part of their contract.

Responses to the other questions, as can be seen, were fairly uniform across the categories apart from two exceptions: direct mail and books.

Direct mail buyers interviewed felt that printers could add a great deal of value in this area, by suggesting different formats and ways of producing a job. Pressure on price is also helped by the way the effectiveness of a mailing can be demonstrated. Mailings are coded and information is collected about responses, enabling results to be directly measured.

The result for books is not so easy to understand, but it was suggested that it may be because of the strong competition from overseas and the lack of competition in the UK. In response to the statement 'You consistently offer competitive print solutions', although nobody fully agreed, 89% did somewhat agree.

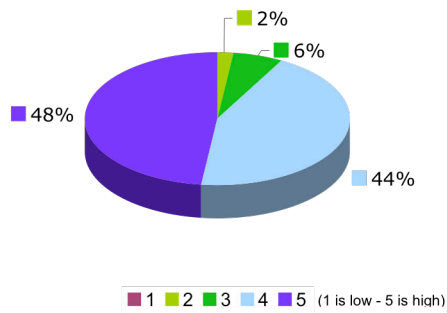
The generally low responses of agreement with this statement continues to paint the picture of buyers selecting their preferred supplier against a range of criteria, of which price is only one, but always being pushed to obtain better prices.

The overall impact of this area on satisfaction with fully satisfied customers was 17%.

Written surveys

These showed that, as a selection criterion, efficient quoting is of moderate importance. Again, there were only a few written comments: 13 in total, of which 11 were about speed of turning quotes around.

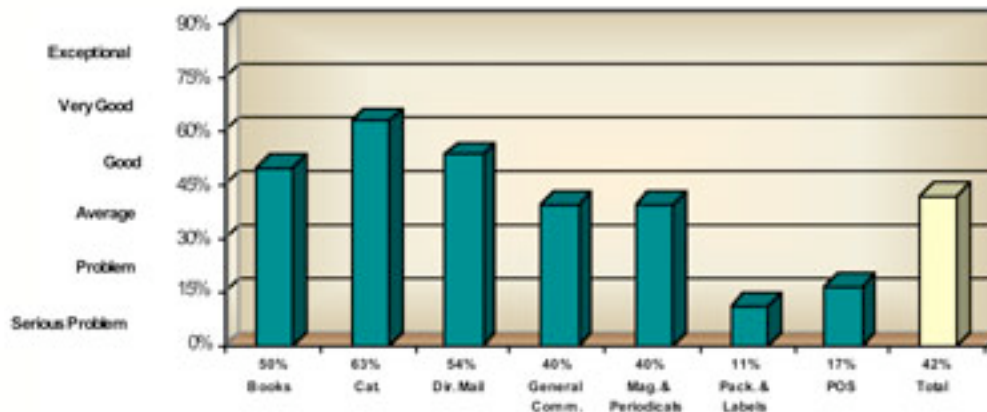
How do you rank the relative importance of efficient quoting when selecting a printer?



In the interviews, too, the most common comments were about speed of turnaround. Additionally, buyers frequently mentioned the importance of following the specification and giving sufficient detail in the quote to allow the buyer to check if the specification had been followed, and laying out the quote as asked.

Appendix H (continued)

Administration

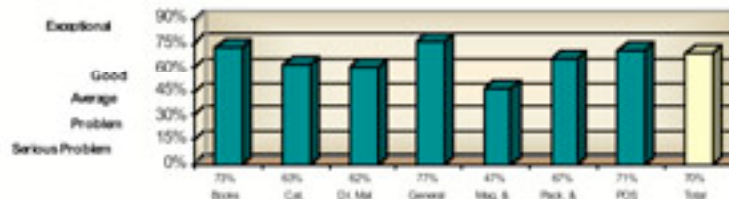


How satisfied are you with our general administration?

The chart above illustrates the percentage of respondents who are Totally Satisfied.

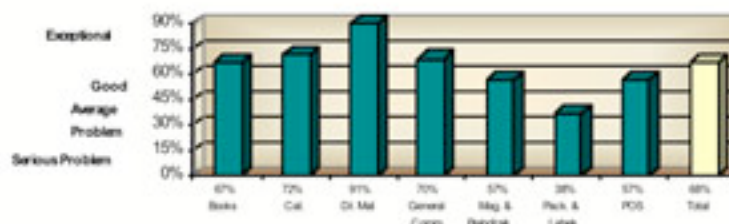
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



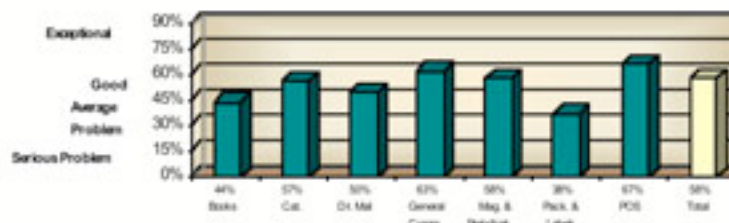
Ordering from your company is an easy process.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Invoices from your company are complete and accurate.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Invoice queries are handled efficiently.

Looking simply at the overall graphs showing responses to the questions on administration gives the definite impression that this is an unimportant area:

- the overall satisfaction level with administration is average

The sub-questions give higher scores, and imply that printers are getting things pretty much as the buyers would like:

- ordering is very good
- the provision of complete and accurate invoices is good
- handling invoices queries is good.

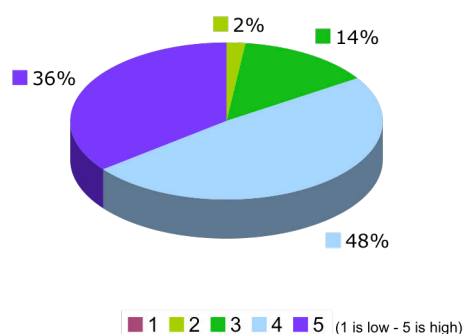
However, the interviews did not reflect this: many buyers commented about problems caused by job numbers missing from invoices and mis-matches on price or descriptions. When the InfoQuest findings are broken down by size the reason becomes apparent. The responses to the statement 'Invoices from your company are complete and accurate', when broken down by size of buyer, shows:

- 46% of large buyers fully agree
- 57% of medium buyers fully agree and
- 70% of small buyers agree

This pattern was the same in the interviews.

The printers the buyers are answering about are still their preferred suppliers, so this indicates that it is not a critical retention criterion, but it does have a measurable impact on customer satisfaction – at 14%, administration is worth looking at. Interviewees generally gave the impression that poor administration, and particularly time wasted chasing or matching invoices, can be a major irritant and so damage a working relationship.

How do you rank the relative importance of good administration when selecting a printer?



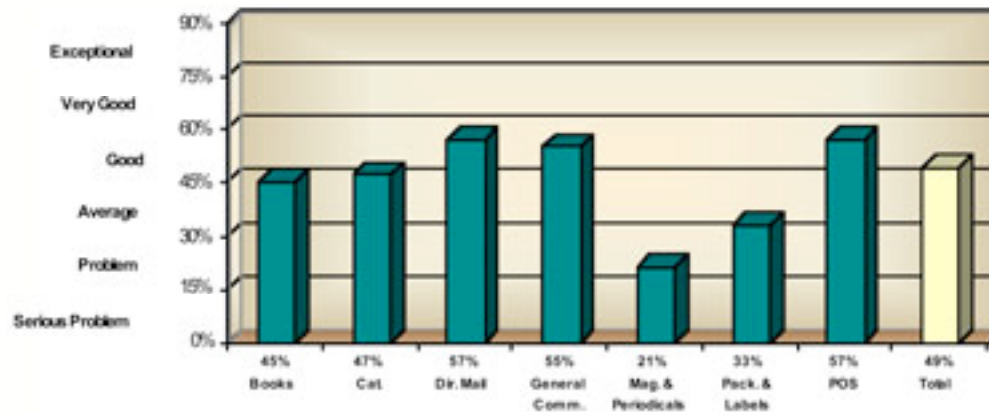
Written surveys

When buyers are selecting a printer, administration is not considered to be highly important; as can be seen on the graph, only 36% of buyers gave it the highest score of 5. However, nearly half the buyers scored it as 4, so it is a consideration, although perhaps difficult to assess before starting work.

Unsurprisingly, no printers were a preferred supplier because of their administration, but 4 of the buyers would give their printer more work if their administration was better, and 5 considered it would enhance that printer's value.

Appendix I: Communications

Communications

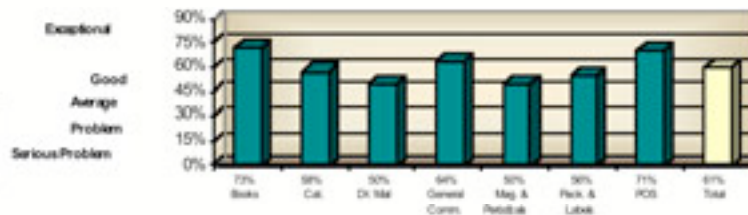


How satisfied are you with the way our company communicates?

The chart above illustrates the percentage of respondents who are Totally Satisfied.

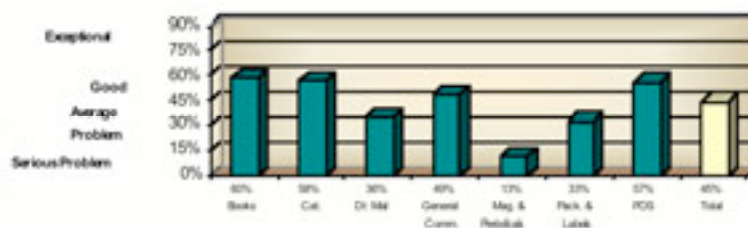
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



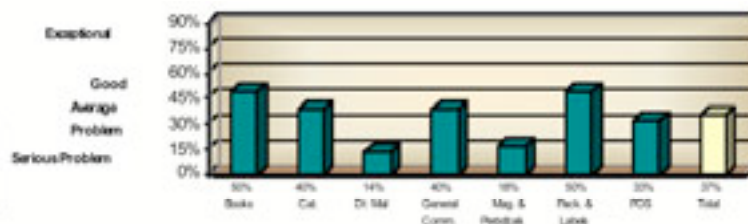
Your people regularly stay in touch with me.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Your company keeps me fully informed.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



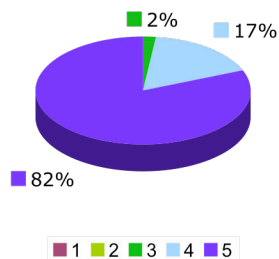
Your internal communications share knowledge of my business appropriately.

The InfoQuest findings show that, on average, communications are good, and regular contact by our respondents' printers is very good, implying that it is important for staying on a supplier list. Overall, the printers are good at keeping their customers fully informed, but with a big drop in the magazine sector. However, when it comes to sharing knowledge internally, the printers are only average – which could explain some of the issues around handovers with key contact staff and relaying delivery instructions.

The overall impact that communications has on customer satisfaction was 14% in the totally satisfied customers, putting it equal fourth with administration.

Written survey

How do you rank the relative importance of good communication when selecting a printer?



Communication is highly important when it comes to winning customers. With 82% scoring it the highest score of 5, it was the 2nd most important attribute, and 99% scored is either 4 or 5. (The rounding of the figures makes the chart add up to 101%.)

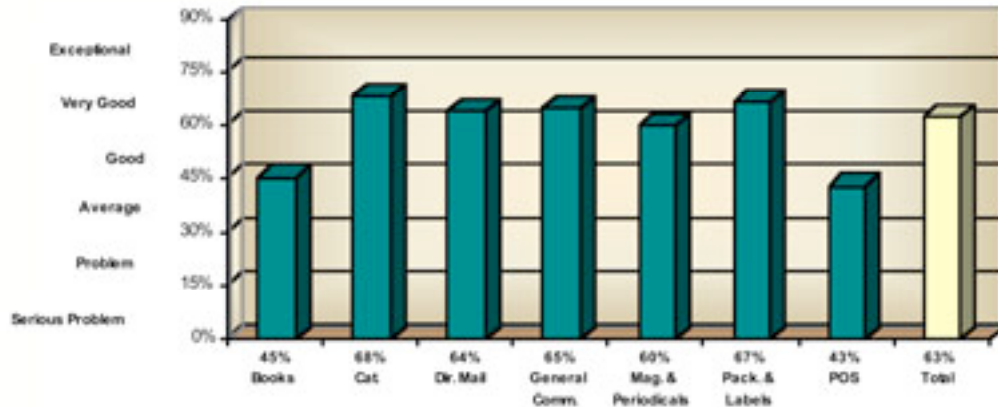
The comments on the written survey showed that:

- 🎯 10 of the respondents considered good communication as part of the mix that made the printer a preferred supplier
- 🎯 5 respondents would give the printer more work if they improved communications
- 🎯 18 of the respondents included improving communication among the actions the printer could take to enhance their value as a service provider.

The implications from this are that communication is important both to winning the customer and retaining them. It appears to underpin everything else. Poor internal communication would certainly affect other areas that buyers felt needed strengthening in order to meet their needs. Many of the comments in interviews relating to communication were on issues that affect customer service – being kept informed – and building relationships, both of which are key retention factors.

Appendix J: Deliveries

Deliveries

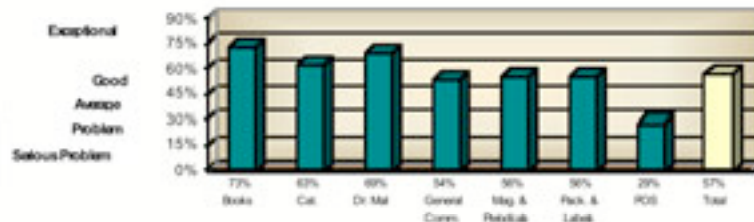


How satisfied are you that we meet your needs for prompt delivery?

The data above illustrates the percentage of respondents who are Totally Satisfied.

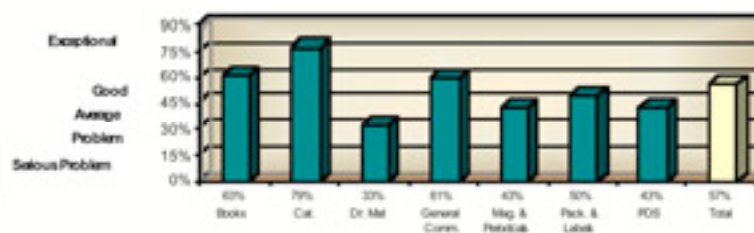
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



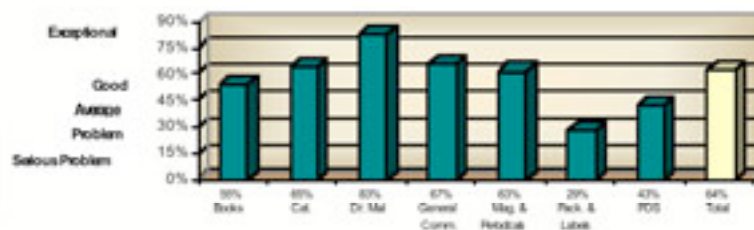
Your deliveries arrive when promised.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Deliveries always arrive with appropriate documents.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



Deliveries arrive in good condition.

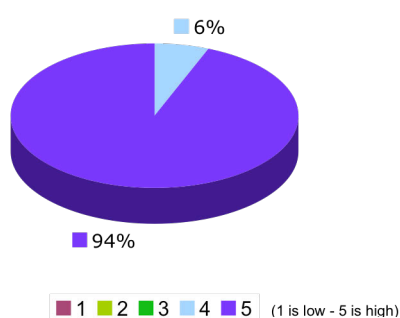
Deliveries seems very much to be a 'given'. A very good percentage of buyers, as you can see in the graphs, were completely satisfied that printers met their needs for prompt delivery. The results to the other three questions all fell into the 'good' or 'very good' sector. But deliveries showed to have no impact on customer satisfaction in the totally satisfied customers. This implies that it is considered by them to be non-negotiable: if the printers can't provide reliability in this area they will not be used. This was supported both by the written survey and by the interviews.

Sectoral differences

The areas where there were sector differences do, in some instances, relate to the nature of the product. The nature of direct mail makes it difficult for buyers to answer the question about deliveries arriving with appropriate documents, but the seeded copies (mailings addressed to staff within the buying company) does allow checking their condition. Packaging and labels are not, in many cases, delivered into the company specifying the packaging – they go to the packer – so buyers found that question difficult to answer.

There were, again, differences according to buyer spend on 'Deliveries always arrive with appropriate documents', with small buyers happier than larger. The difference was not as extreme as with invoices – but several of the smaller buyers were agencies having printed goods delivered into their large customers.

How do you rank the relative importance of timely deliveries when selecting a printer?



Written survey

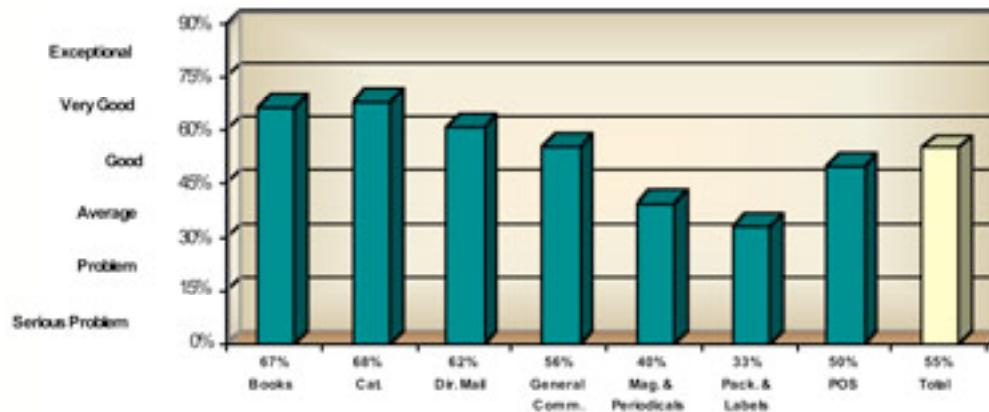
When selecting a printer, timely deliveries was the highest scoring factor. Nobody scored it less than 4, and 94% of buyers ranked it 5. There were few written comments:

- 🌈 7 buyers included timely delivery as one of the reasons for the printer being a preferred supplier
- 🌈 only 2 responses to 'What is the one thing that, if improved, would encourage you to give this printer more work?' related to deliveries: one of which was 'friendly couriers who don't complain about being asked to carry boxes up to our address'.
- 🌈 Just 6 buyers included mention of deliveries as something that would enhance value.

Taken with the other findings, and comments from interviews, this low number supports the implications of the InfoQuest findings: on-time delivery of the right quality is a given, and non-negotiable. Where there does appear to be room for improvement is documentation and the detail of the delivery instructions.

Appendix K: Technical Support

Technical Support

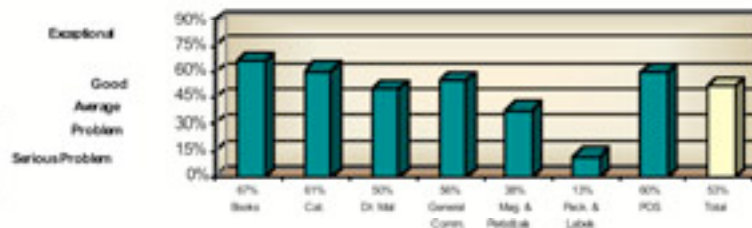


How satisfied are you with our technical support?

The chart above illustrates the percentage of respondents who are Totally Satisfied.

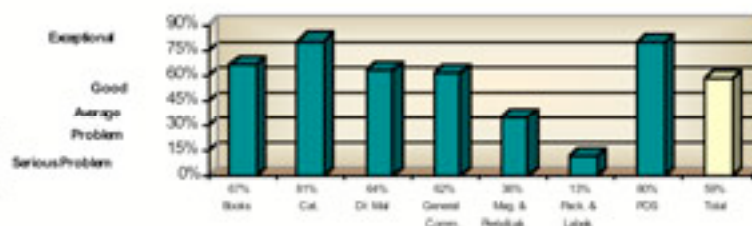
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



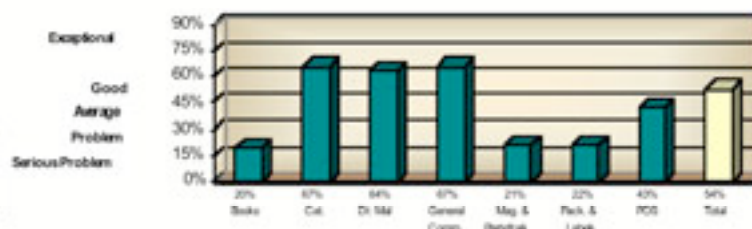
Your company provides all the technical support I need.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



I believe your company will continuously develop technical excellence.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



I believe your company has the resources to help us with all technical issues.

Technical support seems from these findings to be another 'given', to a certain degree. Buyers appear to expect that being a printer includes providing a level of technical support, investing in technology and developing technical excellence as part of the package. The satisfied customers show good levels of agreement with the statements as a group:

- 55% are fully satisfied with their level of technical support,
- 53% fully agree that their preferred supplier provides all the technical support they need,
- 59% believe the supplier will continue to develop technical excellence, and
- 54% believe they have the technical resources to help with all technical issues.

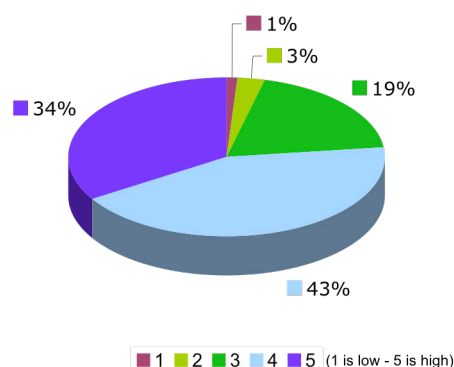
All of these results fall into the very good category, implying that this is one of the reasons buyers stay with their suppliers: but the impact on satisfaction is 0%, as with deliveries. It does not seem likely that providing no technical support would have no impact, so the assumption is that it is something buyers don't particularly think about – they automatically expect that it will be there.

Sectoral differences

Again we have some strange differences in sectors here, where low scores imply that these attributes are perhaps not so important. Packaging and labels could be explained by the way some buyers in this area work, with the retail buyers involved at the design and specifying end but the packers or food manufacturers being the receivers, and more involved in the commercial transactions and process end.

The book publishers interviewed said that they no longer expected a great deal of technical support as the repro has, to a great extent, moved away from the printers and become the problem of the publishers instead. They also are accustomed to working remotely as so much is bought overseas. The magazine publishers interviewed, however, said that they do expect a good level of technical support from their printers.

How do you rank the relative importance of technical support when selecting a printer?



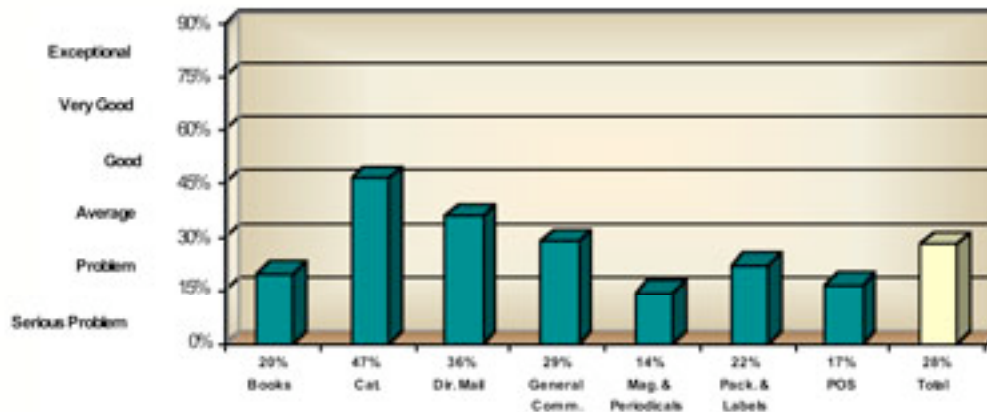
Written survey

In selecting a printer, technical support was ranked as fairly low in importance, as can be seen from the chart, but it is another area that is hard to assess until a buyer and printer have started working together.

- In response to the question about what makes that printer a preferred supplier, just four people included technical support in their answer.
- Nobody cited technical support as something to improve in order to get more work, which supports the assumption that unless it is there to a certain level the printer would not be on the preferred supplier list.
- When it comes to enhancing value, and ad hoc questions about 'other important issues', comments were about being kept up to date on new printing techniques and new stocks that designers might be unaware of, and being shown samples of previous work to demonstrate some of the options available.

Appendix L: Customer awareness

Customer Awareness

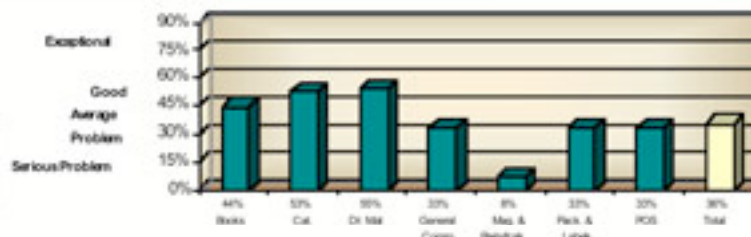


How satisfied are you with our awareness of your business issues?

The chart above illustrates the percentage of respondents who are Totally Satisfied.

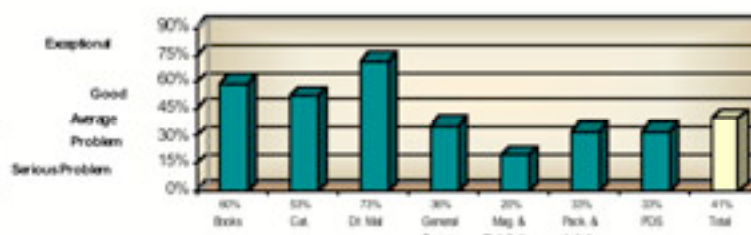
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



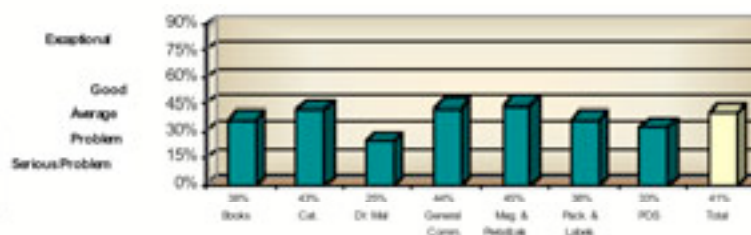
You demonstrate a pro-active approach to my business.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



You help us add value to our business.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



You show a good understanding of the drivers and dynamics of my market.

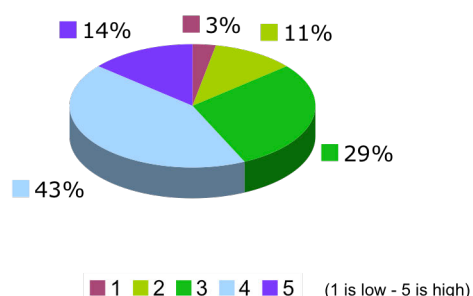
These results show a lot of variation and a degree of conflict. The headline figure of only 28% totally satisfied with their supplier's awareness of their business issues seems to disagree with the 41% feeling that their supplier shows a good understanding of the drivers and dynamics of their market. If you add 'totally satisfied' and 'somewhat satisfied' responses together, there is a better match:

- 🌈 91% are either totally or somewhat satisfied with their supplier's awareness of their business issues
- 🌈 86% either fully or somewhat agree that their supplier shows a good understanding of the drivers and dynamics of their market.

The higher score in direct mail for *"You help us add value to our business"* makes sense, as response rates are directly measurable.

When interviewed, buyers did feel that printers saw printed material as an end in itself rather than thinking about what the buyer's company wished to achieve with it. Taking this viewpoint does restrict a printer's scope for a pro-active approach: which is perhaps reflected in the low score of only 36% here.

How do you rank the relative importance of knowledge/awareness of your market when selecting a printer?



Written survey

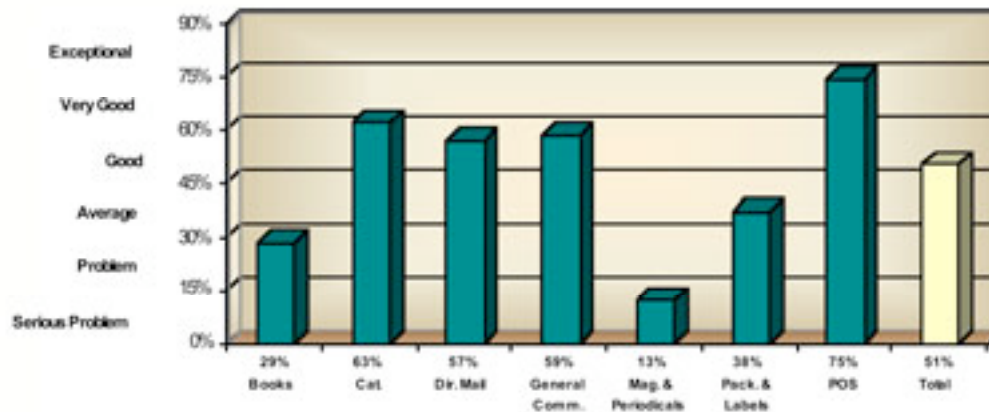
This attribute was scored as having very low importance when selecting a printer, which contradicts comments made in interviews that the best way for a printer seeking work to get to see someone was to demonstrate that they had done their homework and knew something about the company.

- 🌈 8 buyers did cite understanding of their business or market as what made that printer a preferred supplier.
- 🌈 4 buyers felt that the value of that supplier would be enhanced through better understanding of their company.

When interviewed, buyers regularly mentioned how important it is that the printer understands what they are trying to achieve for their company, what products and services are relevant to them and what compliance issues matter. Acquiring this understanding does, of course, require a level of knowledge of the buyer's business and its market. But maybe buyers do not perceive this as being the case.

Appendix M: Compliance

Compliance

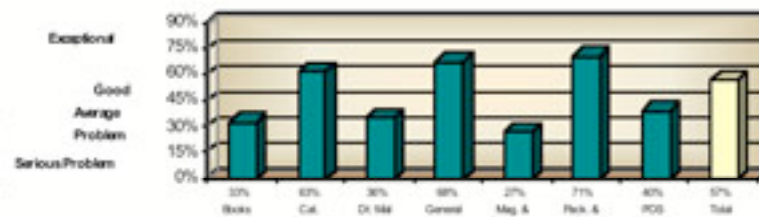


How satisfied are you with our compliance with relevant industry requirements? (e.g. hygiene, data, environment standards)

The chart above illustrates the percentage of respondents who are Totally Satisfied.

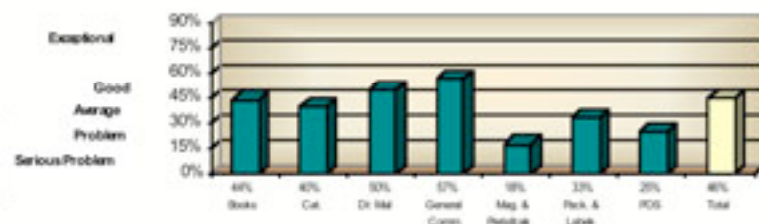
Related Questions

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



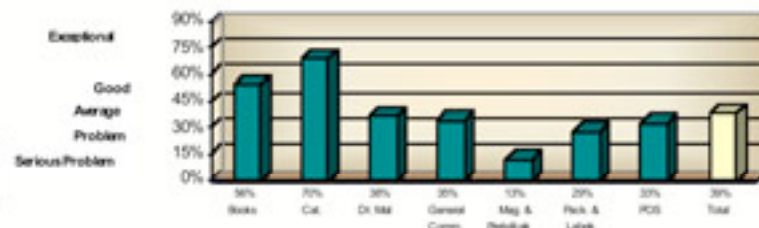
You fully meet our compliance needs.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



You are suitably reactive, adapting as compliance needs change.

The chart to the right illustrates the percentage of respondents who Fully Agree with the statement below.



You are pro-active and anticipate forthcoming compliance requirements.

These questions related to compliance data security, environment, health & safety standards and so forth.

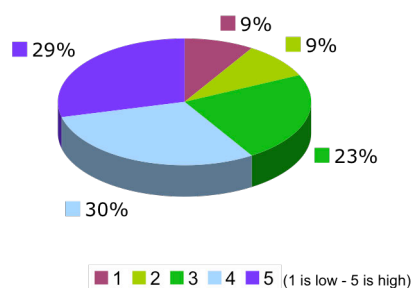
The results in this section are, as can be seen, very varied. Overall satisfaction levels with compliance are good, but with very definite dips for book and magazine publishing. This could perhaps be explained by the pressure these industries are under for sourcing recycled or FSC certified paper, both of which are currently quite challenging demands because of availability of suitable grades.

The packaging sector has some sub-sectors where compliance is a major issue, food and pharmaceutical, for example, so the high response in the second graph is to be expected. Looking at comments in the written survey, and interviewing buyers, does not fully explain the variation in the other sectors and graphs.

It appears we have two different reasons for low scores. Where compliance needs are low, so buyers are not too concerned, is one of them. The other is where compliance to various standards or requirements is preferred but is accepted as being currently difficult. In the latter case, buyers are working with the supplier base to improve overall compliance standards within it. For example, the direct mail industry has long had a need for compliance with data protection standards, but recently is now working with a producer responsibility agreement to increase recycled content and recyclability. These are relatively new challenges and involve the specifier, not just the printer.

The variations can be within a market sector, which makes statistical analysis difficult. The only general conclusion that can be drawn is that printers appear generally good at meeting compliance needs where feasible, but not so good at anticipating them and being pro-active.

How do you rank the relative importance of compliance when selecting a printer?



Written surveys

The written surveys indicate that compliance is currently only fairly important, as can be seen on the chart. In answer to the question *'What is the one thing this printer does particularly well that helps makes them a preferred supplier?'* only one respondent said compliance. The two questions about encouraging more work and enhancing value received no responses relating to compliance.

Most of the information on this topic came from the interviews and from the 'additional' comments: it appears to be a very customer-specific issue at present rather than involving whole sectors, but this is predicted to change over the coming years.

Compliance requirements are further analysed in the feedback section of the Assessment Questionnaire.

Appendix L: Sources of further information

BPIF: www.britishprint.com

The British Printing Industries Federation website.

British Standards Institution: www.bsi-global.com

For copies of PAS 75: the Publicly Available Specification for print production and services and of all the ISO standards mentioned in this report.

The Carbon Trust: www.carbontrust.org.uk

For free advice and publications to help companies save energy costs.

Envirowise: www.envirowise.gov.uk

For free advice and publications to help minimise waste and improve profit.

Print Yorkshire: www.printyorkshire.com

For a free download of *Competitive advantage through customer service excellence* and information about other projects.

Social Accountability International: www.sa-intl.org

For a copy of the SA 8000 standard mentioned in the report and information about how it works.

Vision in Print: www.visioninprint.co.uk

For free downloads of the reports mentioned in the text:

- *Purchasing Best Practice Study* and the related Toolkits
- *Maintenance Best Practice Study*

The site also offers further information about Vision in Print's Productivity Improvement programmes and other projects in progress.

