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Project: The Citadel Increases Foundation Membership with Personalized Incentive and Cross-Media Marketing

Vertical Market: Education
Business Application: Direct Marketing/Direct Order

Business Objectives

The Citadel is a small liberal arts military college located in Charleston, South Carolina. The Brigadier Foundation is the organization that raises money to fund athletic scholarships at The Citadel. The Foundation raises money by offering memberships that come with certain privileges (such as football seating and parking passes) based upon how much money is given. The lowest level is $100 per year and the highest is $12,000.

Most membership renewals took place during phone-a-thons in Georgia and South Carolina during the spring and summer. Membership levels remained constant for several years and in November 2007 the Foundation had only 1,606 members or 6% of known alumni.

The Foundation’s goals for this campaign were to:

• Increase memberships
• Encourage current members to renew online, significantly reducing administrative costs

Results

For the overall campaign the results were:

• 22.75% response rate
• 194 new members representing a 12%+ increase in membership
• 97 membership renewals
• Revenue generated to date is $208,000

The most new members the foundation ever had in a complete year prior to this campaign was around 125. That was due to a new policy on season football tickets requiring alumni to join to get good seats. Normally they got less than 25% of that number. Acquiring 194 new members in six weeks was unprecedented. The school also got people to join who did not live in the southeast. This had not happened very often in the past.
Offer

The central component of the campaign was the offer of a personalized poster with a photo of The Citadel’s Corps of Cadets spelling out the recipient’s name (or another name of their choice) on the parade ground. This offer was exclusive to members of the Brigadier Foundation.

Campaign Architecture

A multi-channel campaign using direct mail, email and viral marketing (word of mouth) was developed to meet the Foundation’s goals. The campaign kicked off on Homecoming weekend in November of 2007. This weekend is the largest gathering of alumni on campus each year.

Phase 1 - Viral Marketing

The first phase of the campaign employed viral marketing. This was accomplished in several ways. First, every member of the classes of 1967 and 1977 who were attending their 30th and 40th reunions was given the gift of a 14” x 20” poster with the Corps spelling their name on the field. The caption under the photo read “The South Carolina Corps of Cadets salutes <name of recipient>, November 2nd, 2007, The Citadel, Charleston South Carolina.” This gift was only for those who were registered for homecoming activities with their class and would be in attendance that weekend. Each class had around 130 attendees.

Another element of the viral marketing was to flash the personalized photos on the scoreboard in the stadium during the game. When the photo was put
on the screen it was done with no explanation. Also the names being spelled on the parade ground for the scoreboard shots were those of “influencers,” or people who can influence the actions of others. When someone saw the photo on the screen it appeared to the fans in the stadium that the Corps had spelled these people’s names during a parade as a special honor to them for their service to the school.

**Phase 2 - Direct Mail**
Following this campaign launch a direct mail postcard was sent to alumni that encouraged them to visit a personalized URL (PURL) and either join or renew their membership to The Brigadier Foundation.

**Phase 3 - Online**
After going to the personalized landing page, if the visitor chose to join or renew their membership they were directed to an online form. On this page if someone was not clear about the benefits of each membership level they could click on a button for more detailed information. Once someone joined or renewed they were sent to a site where they could personalize their poster.

On the poster order page alumni typed in the name they wanted on the field and the caption below. They could then view a proof of their poster before placing their order.

**Phase 4 - Email**
The next phase of the campaign consisted of emails sent to alumni who had not yet visited their personalized landing page.
Phase 5 – Follow-up Direct Mail
Letters were sent to targeted groups of alumni.

Reporting
A password-protected reporting site was created so that the Foundation could track the activity of the campaign in real time 24/7. The reporting site detailed:

- The response rate to date (measured to a 100th of a percent)
- The number of new members to date
- The number of renewals to date
- Total number of contributors
- The amount of money committed
- Number of additional posters purchased
- A listing of everyone who visited the site and how long they stayed

By analyzing the real time data, the Foundation and Kennickell Print and Global Marketing were able to change the email blasts to achieve better results.

Target Audience and Messaging
The target audience for all phases of the campaign was alumni of The Citadel. The campaign was structured at all stages to appeal specifically to this audience. The reasoning behind each marketing channel becomes clear with an in-depth analysis:

Why Viral Marketing?
The purpose of giving the free posters to certain alumni groups at Homecoming was two fold:

- To judge the reaction to the gift in order to understand the value of it to average alumni
- To get people talking about the posters

The reaction of those who received the posters told The Foundation and Kennickell that it would be a coveted gift. Most could not wait to get home and have it framed.
Why Direct Mail?
By showing an image of the recipient’s name spelled out by the Corps on the postcard, The Foundation hoped to attract the attention of alumni. Under the photo was a caption reading “The South Carolina Corps of Cadets would like this to be <recipient name> Day at The Citadel. Find out why at <recipient.name>.sc-corps.com

By seeing their name spelled on the parade ground and also in a PURL, it was hoped that alumni would be driven to the site and complete a transaction to join or renew their Brigadier Foundation membership. The back of the card explained that if they went to the PURL they could receive a free gift for Brigadier Foundation members only.

Why Go Online?
On the personalized landing page alumni learned about the custom poster offer. If they were not a member but decided to join they could have the poster version of the mailer with their name or any other name they wanted on the field plus any caption under the photo for free. Current members could have the personalized poster if they renewed online. By giving them the option to use their name or another name, recipients had the opportunity to present the poster as a gift to friends or family.

On the landing page it was made clear that the posters were available only to Brigadier Foundation members and to no one else. Members were also told that they could buy additional posters for $40.

There were slight differences in the copy on the site for current members versus non-members. Members were told their level of membership so they would renew at the same level or higher.

Why Use Email?
Emails were sent to alumni who had not yet visited the PURL. The message in the email was slightly different from the postcard. After reviewing the real-time response data the Foundation learned that while they had a high response rate (22% of the people went to their personalized landing page) only 4% of those who went to the site renewed or joined. As a result the message on the emails was changed to more urgently express the need to join or renew now.

Why Follow-up with a Letter Campaign?
Because The Foundation and Kennickell were able to track the results in real time on the reporting site, they were able to make adjustments for the final phase. They learned that while they were getting a lot of new members they were not getting as many renewals as they would like.
One of the issues was that some people had just joined four months earlier in connection with football season. There were, however, a large number that had joined over six months ago. Kennickell decided to change the message slightly on the personalized landing pages and in a follow up letter. The new message explained in detail why The Foundation needed people to renew now and not wait.

The letters went to four separate lists – current Brigadier Foundation members, Athletic Hall of Fame members (who were not members of the Foundation), basketball fans on the basketball coach’s database and baseball fans on the baseball coach’s database. These recipients had not responded to the original postcard or emails.

Kennickell drafted the letters so that they appeared to be coming from the coaches. The letter to the current members (which was the largest list) was signed by the head football coach. The football coach was chosen because the football team had just completed its best season in 15 years. Consequently, the coach generated a lot of good will. The Hall of Fame members got a letter from the athletic director and the basketball and baseball fans received letters from the respective coaches. In each letter the writer made a few comments about their sport (the athletic director’s letter was more about scholarship needs) and then made the request for them to join or renew now on behalf of The Foundation.

Each letter explained why it was important to join now. Each letter also added the human element by pointing out that some young men and women could go to the school only with financial help, and their membership provided that help.

List

The school has mailing addresses for around 25,000 alumni.

Creative and Outbound Pieces

The creative on the postcard, emails and the landing page featured the same aerial shot of the parade ground with the Corps spelling out the recipient’s name.

To create the image an aerial photo was taken when the Corps of Cadets were in formation during a military parade. Using software developed by Kennickell it was possible to digitally rearrange the cadets on the field to spell out people’s names. The software does this in a way that appears completely realistic. Were it real, it would be an unprecedented honor to have the cadets spell out your name. Cadets have not done this in the past but it is certainly possible, thus making this believable.
For the emails there were some instances where The Citadel did not have a name associated with an alumni email address in their lists. In these cases the photo had the Corps spelling “Your Name Here” on the field.

**Reasons for Success**

This campaign was a tremendous success for several reasons.

- The offer was very compelling and only available to those who responded in the desired fashion – joining or renewing their membership to The Brigadier Foundation
- The use of PURLs and a well-designed personalized Web site made it easy for recipients to join The Foundation and to order their customized poster
- The different media channels were well integrated and the initial viral marketing phase helped to create a buzz around the custom posters

The Foundation and Kennickell hope to repeat this success with a similar campaign for membership in 2008. For the 2008 campaign they are taking advantage of The Citadel’s renovated stadium. A photo was taken of the football field and personalized shots of a name being spelled on the field by the Corps in front of a packed stadium will be the focal point.
| **Client** | The Citadel Brigadier Foundation  
www.citadel.edu  
The Citadel is a liberal arts military college located in Charleston, South Carolina. The school has approximately 2,000 students. The Brigadier Foundation is the organization that raises money to fund athletic scholarships at The Citadel. |
| **Print Provider & Agency** | Kennickell Print and Global Marketing  
www.kennickell.com  
Kennickell was founded as a printing company in Savannah in 1892. The company is still owned and operated by the Kennickell family and is now one of the largest printers in the state of Georgia. As a true global marketing services provider, Kennickell now offers services such as fulfillment, leads management, personalized print and database management. |
| **Hardware** | Kodak NexPress |
| **Software** | Custom in-house programming for PURLs and image generation |
| **Target Audience** | Alumni of The Citadel |
| **Distribution** | 25,000 |
| **Date** | November 2007 – January 2008 |
Project: Simek Builds Leads with Personalized Direct Mail and PURLs

Vertical Market: Other – Construction

Business Application: Direct Marketing/Lead Generation

Business Objectives

Jim Simek, owner of Simek Custom Homes, has been building custom homes in the San Antonio area for thirty years. He specializes in a style called Texas Hill Country.

The decision process for selecting a builder for a custom home typically takes from four to six months. However, many potential prospects begin the investigation many months if not years before they select a builder. Simek needed a campaign that would:

- Generate leads by targeting owners of unimproved lots
- Increase business during typically slow months
- Grow awareness of Simek Custom Homes

Results

- 2.5% response rate – recipients visited personalized URL (PURL)
- 1.3% of recipients completed the survey on their PURL
- 355% increase in Web site hits
- 168% increase in average time on Web site
- Four new customers as a result of this campaign
- 13 prospects were identified who planned to build within 12 months
- 18 prospects were identified who planned to build in the next 13-24 months
- 13 additional prospects were identified from a generic URL accessed via the Simek Web site
- 100% acquisition of respondent emails for future marketing
DIG and their client Blue Tape developed a cross-media marketing strategy for Simek.

- A personalized direct mail piece showcasing Simek’s custom homes directed recipients to a personalized URL (PURL)
- At their personalized Web site recipients could enter a contest
- Thank-you emails were sent to those who completed the survey on the personalized Web site.
- A follow-up email was sent announcing the contest winner, giving Simek another opportunity to communicate with prospects.
Target Audience and Messaging

To generate leads for Simek, DIG and Blue Tape targeted people who already owned a lot but had not yet built on it.

The personalized direct mail piece focused on Jim Simek’s experience and the fact that clients deal directly with him. The mailer also included a list of neighborhoods where Simek had built custom homes. This list was variable based on where the recipient’s lot was located.

Recipients were encouraged to visit a PURL and enter to win a “Simek Build Bag.” At their personalized Web site recipients could provide information about their current stage of planning, the style and price range of home they were thinking of building. The Web site included suggested next steps based on the respondent’s planning status. Each subsequent page included images of other homes in the style and price range matching the respondent’s selections.

Thank-you emails were versioned based on where the respondent lived currently. The emails invited respondents to drive by Simek-built homes in their area.

Simek’s primary Web site was updated to include links to the contest allowing additional interest to be generated. People entering via the Web site used a guest login on the landing page.

The follow-up email announcing the contest winner stressed that Jim Simek is always available to answer any questions about building a Texas Hill Country home.

Offer

The direct mail piece included an offer of a “Simek Build Bag” which contained items helpful when planning and building a custom home. The contents of the personalized canvas tote bag included disposable camera, compact tool set, gift cards, furniture templates and a portfolio to hold paint swatches.

List

A list of people with unimproved lots was purchased.
Creative and Outbound Pieces

The direct mail piece used relevant images of a typical unfinished lot in the area and a sample Simek home. Images on the personalized Web site and the thank-you email varied based on the style of home that the recipient had expressed an interest in.

Reasons for Success

Simek’s reputation is built on high quality, attentive customer service and building homes to meet clients’ specific needs. For these reasons it was important that a campaign marketing Simek treat prospective customers as individuals with unique home needs. The personalization of the direct mail, Web site and emails accomplished this and made the recipient feel like Simek was listening to them.

The Simek campaign began just as the nation was entering one of the slowest periods for new home starts in history. 44 potential buyers were added to the Simek database as a result of the campaign. These leads, considered in a nurture status until the national credit crisis abates, are strong prospects for Simek. Since prospect emails were captured as part of this lead generation effort, inexpensive email communications are being used to maintain mindshare for Simek Custom Home Builders. Mr. Simek believes that these leads should deliver his typical closing rates once the credit situation improves and he expects to close at least two to three contracts from within this database.
| Client          | Simek Custom Homes  
|----------------|---------------------
| www.simekcustomhomes.com |
| Print Provider  | Blue Tape  
| www.printingonmain.com |
| Marketing Agency| Digital Innovations Group (DIG)  
| www.digcreative.com |
| Print Provider  | Blue Tape  
| www.printingonmain.com |
| Marketing Agency| Digital Innovations Group (DIG)  
| www.digcreative.com |

Simek Custom Homes has been building custom homes in the San Antonio area for thirty years. They specialize in a style called Texas Hill Country.

Blue Tape services include digital, offset and large format printing, data and mailing services, electronic messaging and results analysis.

Digital Innovations Group (DIG) offers strategic sales and marketing consulting and training, as well as marketing and design solutions to cutting-edge businesses and organizations around the country.

<table>
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<th>Hardware</th>
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Project: ThermaTru Trims Costs and Boosts Effectiveness Through Customized Collateral Management and Production

Vertical Market: Manufacturing
Business Application: Collateral Management/Personalized Sales Collateral

Business Objectives
• Save time and money on marketing material production
• Create an easy-to-use system for territory managers and distributors to create customized marketing collateral
• Maintain quality and consistency of corporate marketing materials

Results
• Production time reduced from months to less than one month.
• Within the first two months that the system went live, 36 builders and distributors used it to create several hundred pages for various brochures
• Builders and distributors can create their own brochures online.
• Ease of use is resulting in more brochures in the market yielding more ThermaTru door sales.

Business Need
Anyone who has ever built or remodeled a home knows there are hundreds of choices that have to be made, and that the appearance and quality of the doors can dramatically impact the value of the home. It's no surprise then that manufacturers are willing to spend significant amounts of money on sales collateral for their products. ThermaTru is no different since the price for a single door can range from several hundred to several thousand. The total cost for all the doors needed in a single house can top tens of thousands or more. ThermaTru had been using multi-page, full-color sales brochures as sales aids for distributors and custom builders for some time. Builders and home supply stores such as Lowes use these brochures to acquaint customers with the many options available to them.

The company had found, though, that there was a lot of manual processing and time involved in creating the brochures. The design stage was particularly time consuming. It could take as long as six months to produce a single brochure.
Workflow

Having used Metzgers for seven years, ThermaTru asked Metzgers to bid on a project to create a Web-to-print system that would enable builders to create and order customized brochures online. Metzgers won the bid in part because it was able to design and build a custom system that would accommodate all of ThermaTru’s requirements.

The system allows the distributors or the custom builders to create a brochure with up to 32 pages. The average brochure contains images of a wide range of doors, all in full-color and printed on glossy stock. When the user enters the site, they are first taken to the pricing and page count selection. Here, they can choose to build the brochure themselves, or have Metzgers create the brochure for them. Pricing information is provided for both options. The user then selects the quantity to order.

The process of customizing the brochure begins with the front cover. The user is presented with three front cover designs to select from and they can choose from hundreds of images available in the Therma-Tru library, or upload their own. They can also customize this template with their own logo. The layout adjusts depending on the marketing message and graphics selected.
The user then customizes the inside pages. There are over 40 layout options for the inside pages, including layouts that can accommodate up to 21 images on one page. The user selects which product family out of 23 options they wish to highlight and selects individual product images. Copy is also chosen from a list of 25 pre-approved marketing messages. These messages are inserted in the brochure and the format automatically adjusts to accommodate for the text.

To create the back cover, users are given the choice of three templates with the ability customize products, marketing messages and images. The user’s address and contact information are pre-populated and added to the brochure. The last step takes the user back to the confirmation page where they can preview their brochure and checkout.

ThermaTru’s marketing manager and territory manager review the pages online as part of the review and approval process before the brochures are printed at Metzgers.

**Driving Traffic**

Within the first two months that the system went live, 36 builders and distributors used it to create several hundred pages for various brochures. During the launch phase of the project Metzgers hosted a series of Webinars with the Therma-Tru marketing department to let the builders and distributors learn about the new system. Metzgers and ThermaTru are working together to spread the word about the new system through direct mail and are offering incentives for builders and distributors to give the system a try.
Reasons for Success

So far, the users have found the system easy to use with only a little effort required to understand the process initially. Joe Metzger, President of Metzgers, recalls that the first person to use the system was a distributor who created and ordered a 16-page brochure. Afterwards, the distributor likened the process to assembling a gas grill—a little tough but after the first few “bolts” it was a smooth process.

This application won an Honorable Mention in the Collateral Management category for PODi’s 2009 Best Practices Awards.
| Client | ThermaTru  
|        | www.thermatru.com  
|        | Headquartered in Maumee, Ohio, Therma-Tru Doors manufactures fiberglass and steel exterior door systems. Founded in 1962, today the company offers a wide array of entry and patio door system solutions, including decorative glass doorlites, sidelites and transoms, and door components.  
| Print Provider | Metzgers Printing and Mailing  
|              | www.metzgers.com  
|              | Founded more than 30 years ago as a type house, Metzgers has steadily expanded its services to include digital prepress, digital printing, six-color printing, and direct marketing as well as a full-range of printing, mailing and fulfillment services.  
| Hardware Software | Xerox iGen4 with in-line Duplo booklet maker and Xerox Freeflow RIP  
|                  | Pageflex Storefront  
| Target Audience | Home builders and remodelers and their customers  
| Distribution Date | Print orders vary, minimum order 100 brochures  
|                   | February 2008, ongoing |
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You’ve discovered PODi’s case study database which includes over 350 digital print success stories – the largest collection in the world.

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“During these challenging economic times when we have to make decisions about expenditures and their value, our membership in other organizations may have to be suspended, but PODi pays for its annual dues over and over again!”

- Ann Mitchell, CEO, DirectConnect Solutions

In 2008, PODi members averaged profits of 11.6%, compared to a printing industry norm of 2.7%. You can give your entire team the resources and support they need to be successful with digital print for as little as $65 a month. Why wouldn’t you make PODi a vital part of your business strategy?

“Our membership with PODi has been the top resource we rely on for planning the strategic direction of our business. PODi resources, modeling, case studies, and peer-to-peer networking are invaluable.”

- Theresa Cloutier, Principal, DMM

PODi membership pays for itself.

- Get more leads and promote your company to more than 60,000 prospects annually
- Train your sales force to find high margin business and sell more successfully
- Save thousands of dollars with expert advice and discounts on events & products

“Any day you’re not learning something new about the digital world is a day you’re losing ground. We value PODi – it provides a constant stream of new ideas.”

- Al Kennickell, President, Kennickell Print & Global

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• Join online at www.podi.org
• Fax the attached form to 650-649-2999
• Call 585-239-6093. Or contact us at info@podi.org
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“Our membership with PODi has been the top resource we rely on for planning the strategic direction of our business. PODi resources, modeling, case studies and peer-to-peer networking are invaluable.”
- Theresa Cloutier, Principal, DMM

• Get more leads and promote your company to a qualified audience
  - Reach over 60,000 visitors annually. Free Premium Listings (a $450 value) on Find a Service Provider
  - Special Perks. You’ll get top billing in searches & featured placement for new members & when you renew, another $500 value
  - Exclusive Privileges. Use PODi case studies & reports as offers in your own lead gen campaigns
  - Build your reputation. PODi is the premier organization for digital print. Members are widely recognized as industry experts

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- Sylvia McPherson, Custom Data Imaging

• Train your sales force to find hi-margin business and sell successfully
  - Energize sales. The world’s largest collection of digital print case studies is yours – 24/7. Nonmembers pay more than $8,000 for this resource alone
  - Close more sales. Your team will have over $7,500 of proven tools to make selling solutions easier, faster, and more profitable
  - Learn from industry experts. Free monthly webinars on hot topics
  - Build your strategy. Industry reports and presentations

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- Mike Meshkati, President, Sina Printing

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  - Easily recoup your annual fee with money saved on expensive consultant services and hours of research time. Use our free, on-call Ask the Experts service
  - Save time with best practice marketing operations resources. Practical tools to increase your efficiency, valued at over $3,000
  - Members-only discounts on events & products, like PODi’s annual AppForum event and CheckPPML_Pro

“PODi pays for its annual dues over and over again!”
- Ann Mitchell, CEO, DirectConnect Solutions

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www.podi.org
New Membership Application Form
Fax to: 650-649-2999

Dues are based on the number of employees in your business.

**Service Provider:** companies that provide digital print, marketing or integration services.

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**Industry Vendor:** hardware & software vendors, and related fields such as paper, finishing or distributors.

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**Enterprise:** companies that utilize print in their marketing strategies

| Annual Dues | $500 |
| Joining Fee | $150 |
| **Total**   | **$650** |

**Associate:** industry organizations, educational institutions teaching digital print, 1-person consultant businesses, or journalists.

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City: _____________________________       State/Province:  ___________       Postal Code:  ____________       Country:  ____
Web Site: _____________________________       Telephone:  _____________________________

**Primary Contact Info:**
Name: _____________________________       Title: _____________________________
Address:  _________________________________________________________________________________________
Direct Phone:  _____________________________       Email:  _____________________________

**Payment:**
Credit Card Type:  _____ Master Card _____ Visa _____ AmEx  _____ Discover
Credit Card Number:  _____________________________       Exp. Date:  _____________________________
Cardholder Name:  _____________________________