

Canon

ENHANCING THE PRINT
CUSTOMER CONNECTION
**THE JOB SUBMISSION
CHALLENGE —
ONBOARDING YOUR
CUSTOMERS**



A NAPCO Research Study and White Paper
Sponsored by Canon U. S. A., Inc.

The Job Submission Challenge — Onboarding Your Customers

In the early days of e-commerce, many analysts predicted widespread adoption of online web portals for print ordering and job submission. While e-commerce is commonplace today in consumer and business-to-business markets, communication buyers' use of online platforms for ordering and submitting print work is not as prevalent. While these online systems can offer buyers the ability to centrally manage and track their print work and spending, many organizations prefer the flexibility offered by using multiple methods to submit print work.

A customer's experience working with a print provider begins with job submission and onboarding. Given the importance that customer experiences play in communication buyers' selection of print providers, a 2021 NAPCO Research* study, sponsored by Canon U.S.A., Inc., surveyed communication buyers and print providers to identify ways to help improve interactions, from quoting a job through delivering the finished product.

Online print ordering and job submission options have been available to print providers for nearly two decades. Because print provider adoption of online portals took time, print buyers embraced other methods such as email and uploading job files, which they still use today.

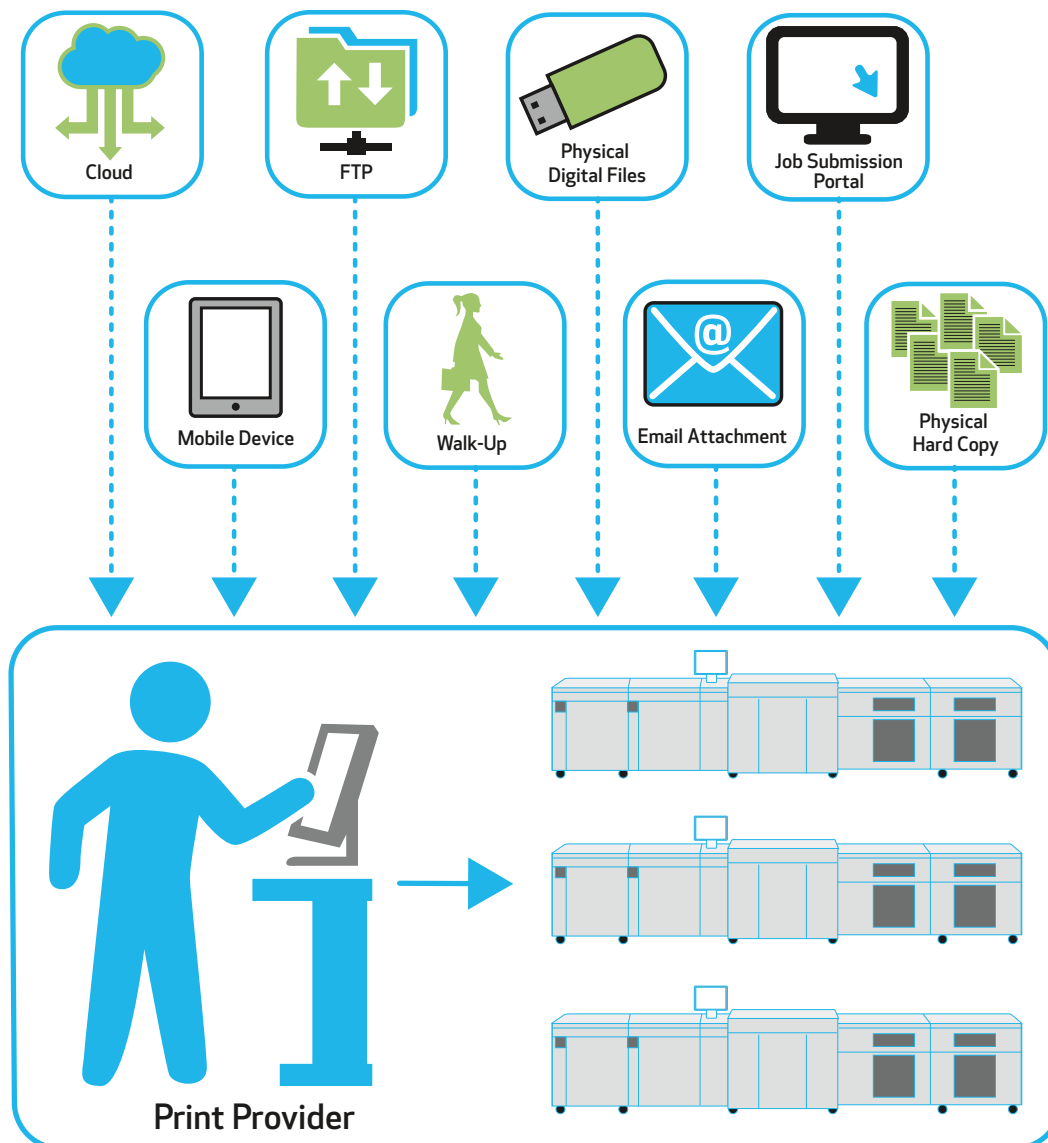
A key study finding is that communication buyers prefer, and use, a variety of options for submitting print work. Job submission via email, uploading files through FTP, online file sharing services, and even physical storage media haven't disappeared. Email and file uploading, in particular, are deeply ingrained in many customers' job submission processes.

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

The survey revealed that 60% of communication buyers use online ordering for print work, but only 22% of print volume is ordered through these systems. This finding indicates that offering multiple job submission options is key to onboarding customers.

This research study offers insights into what buyers expect and perceive as valuable. Meeting customer job submission requirements can help enhance the customer experience.

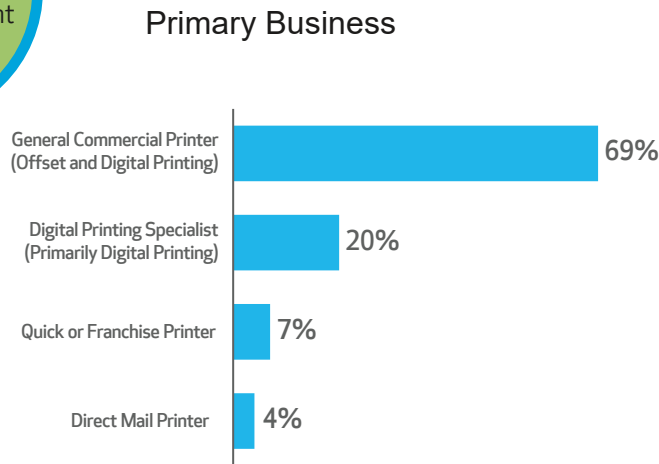
Organizations Prefer the Flexibility of Using Multiple Methods to Submit Print Work



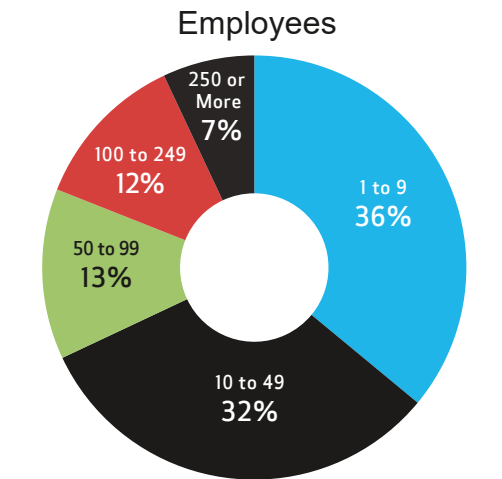
Over 200 Print Providers and Print Buyers Surveyed

The study surveyed 193 commercial printers, 80 in-plants, and 211 communication buyers to assess print job submission and production trends across the print supply chain. Figures 1 and 2 describe the types of printers participating in this study.

Figure 1
Commercial Printer Respondent Profiles



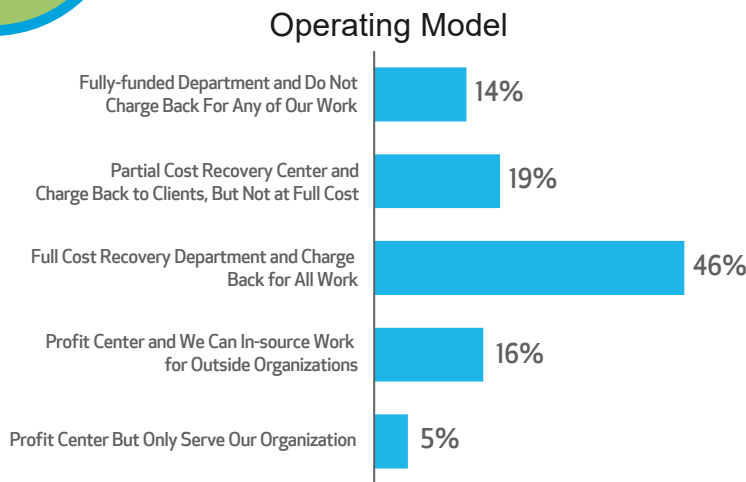
Q. Which category best describes your company's PRIMARY business?
N = 193 Commercial Printers



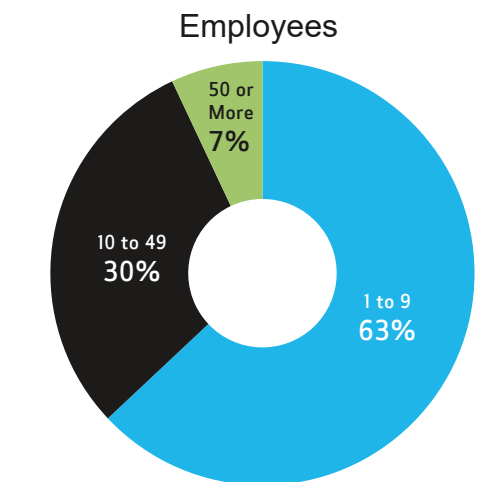
Q. How many employees work at your company or in-plant?
N = 193 Commercial Printers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Figure 2
In-Plant Respondent Profiles



Q. Which of the following best describes your in-plant operation?
N = 80 In-Plants



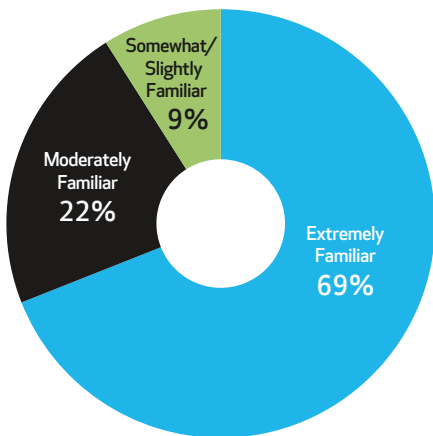
Q. How many employees work at your company or in-plant?
N = 80 In-Plants

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Over 200 communication buyers (print buyers and influencers) (Figure 3) participated in the survey. Respondents hold top-level or key management positions and work at organizations representing a mix of sizes, with most employing over 100 people. To qualify to take the survey, communication buyer respondents needed to either purchase or influence print and be familiar with the methods used by their organizations to submit print jobs. Over two-thirds of respondents (69%) report that they're extremely familiar with printing processes used to produce their organization's printing work while 22% are moderately familiar and 9% somewhat/slightly familiar.

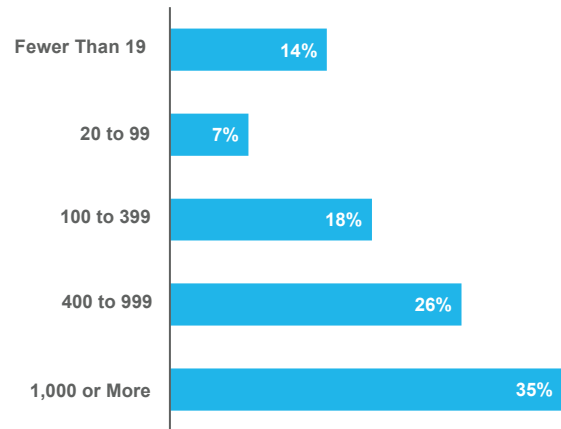
Figure 3
Communication Buyer Respondent Profiles

Familiarity With Print Processes



Q. How familiar are you with the printing processes used to produce your company's printing?
N = 211 Communication Buyers and Influencers

Number of Employees



Q. In total, how many people does your organization employ?
N = 211 Communication Buyers and Influencers

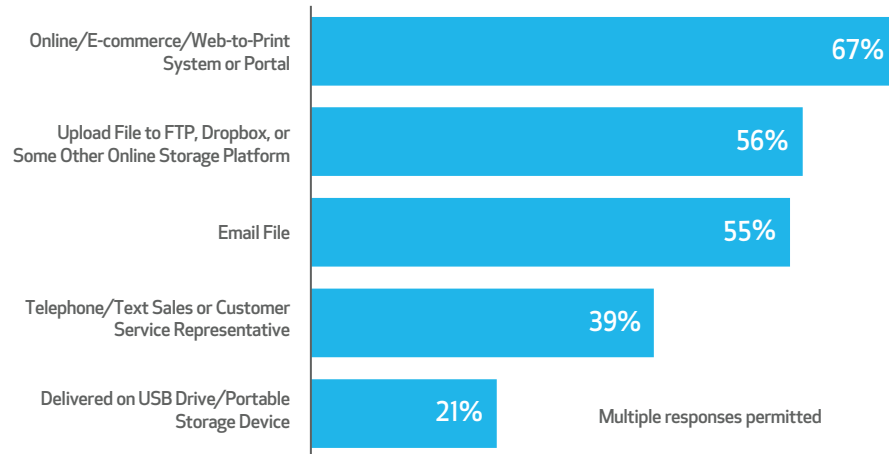
Source: Enhancing The Print Customer Connection, NAPCO Research 2021

The majority of communication buyer respondents (63%) have been involved in purchasing or influencing print for six years or more. Two-thirds of respondents (66%) report having an in-house printing operation.

Communication Buyers Submit Print Work Via Multiple Methods

Communication buyer respondents use multiple methods to submit print work. While two-thirds (67%) report using an online ordering system, more than half upload (56%) or email (55%) job files to print providers (Figure 4).

Figure 4
Communication Buyer Respondents' Job Submission Methods

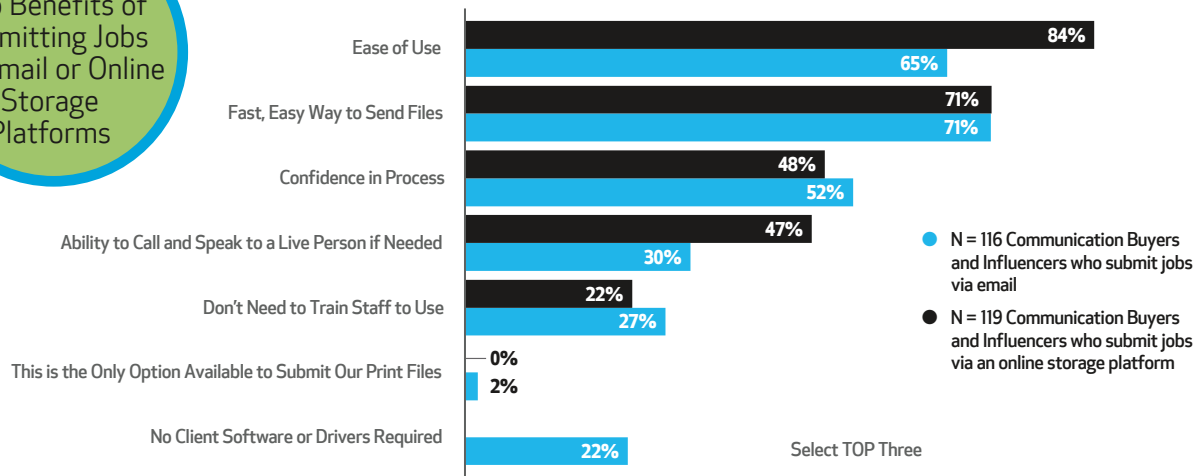


Q. How does your organization submit print jobs to your print providers?
N = 211 Communication Buyers and Influencers
Source: Enhancing The Print Customer Connection, NAPCO Research 2021

The Appeal of Email and File Uploading

Email and file uploads are popular job submission methods because communication buyers find them easy to use and a fast way to submit work. Figure 5 compares the top three benefits identified by communication buyers who use email and those who upload job files through FTP sites or online storage platforms like Dropbox. Respondents report the same top benefits for each method: easy to use, fast way to send files, and confidence in the method.

Figure 5
Top Benefits of Submitting Jobs Via Email or Online Storage Platforms



Q. What are the TOP THREE benefits of submitting a print job via email?

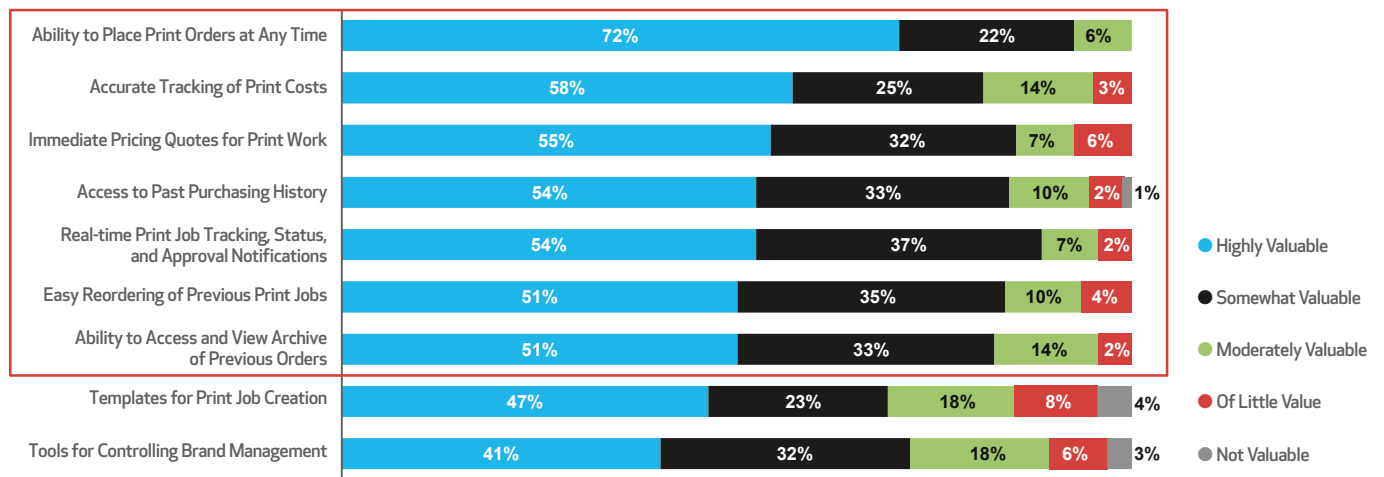
Q. What are the TOP THREE benefits of submitting a print job by uploading it to FTP, Dropbox, or some other online storage platform?

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

While respondents value email and file uploading systems, they don't offer the same level of benefits provided by an online ordering portal. By themselves, they can't preflight files, generate price quotes, or provide the type of benefits that e-commerce solutions can deliver to customers.

According to the survey, communication buyers highly value the ability to place print orders at any time (72%), accurately track print costs (58%), get immediate pricing quotes for print work (55%), access past purchasing history (54%), get real-time job status, easily reorder jobs, and access previous orders — all benefits delivered by online ordering portals (Figure 6).

Figure 6
Communication Buyers Value Agility, Accuracy, and Access



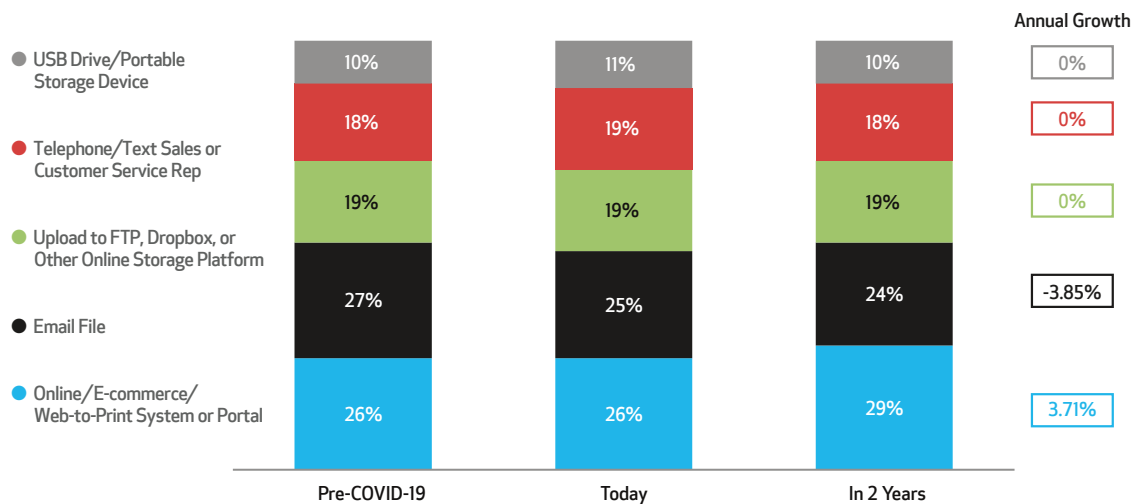
Q. Please rank the value that the following capabilities provide to your organization.
N = 211 Communication Buyers and Influencers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Buyers Expect Little Change in Job Submission Methods

The survey asked communication buyers to break down the methods they used to submit digital print work before the COVID-19 pandemic, the methods they use today, and what they expect in two years. Overall, buyers expect little change in how they submit files for digital print work (Figure 7).

Figure 7
Communication Buyer Job Submission Methods Hold Steady



Q. Of your digital printing work, what is the breakdown of how jobs are submitted to your print providers pre-COVID-19, today, and what you expect it will be in two years?
N = 211 Communication Buyers and Influencers

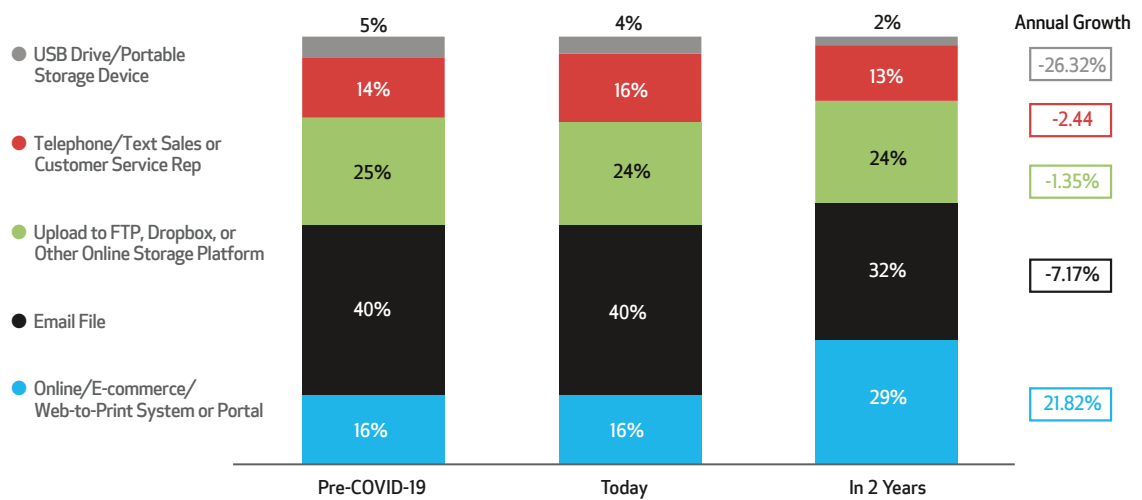
Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Communication buyers report using a mix of methods to submit digital print work to print providers. They report that a little over 25% of print work is submitted via online web-based/e-commerce portals and about the same is submitted by email, while uploading files or working with a salesperson/customer service rep are also routinely used. Online job submission tools may offer many powerful job management advantages, but buyers either don't know about them or they don't add value to the print work they produce.

Providers Expect Online Job Submission to Increase

On the other hand, commercial printer respondents (asked the same question) expect the use of online portals to increase 22% annually, from 16% today to 29% in two years (Figure 8). This finding reflects commercial print providers' ongoing optimism in customer adoption of online portals, which communication buyer respondents didn't share.

Figure 8
Digital Print Job Submission Methods — Commercial Printers

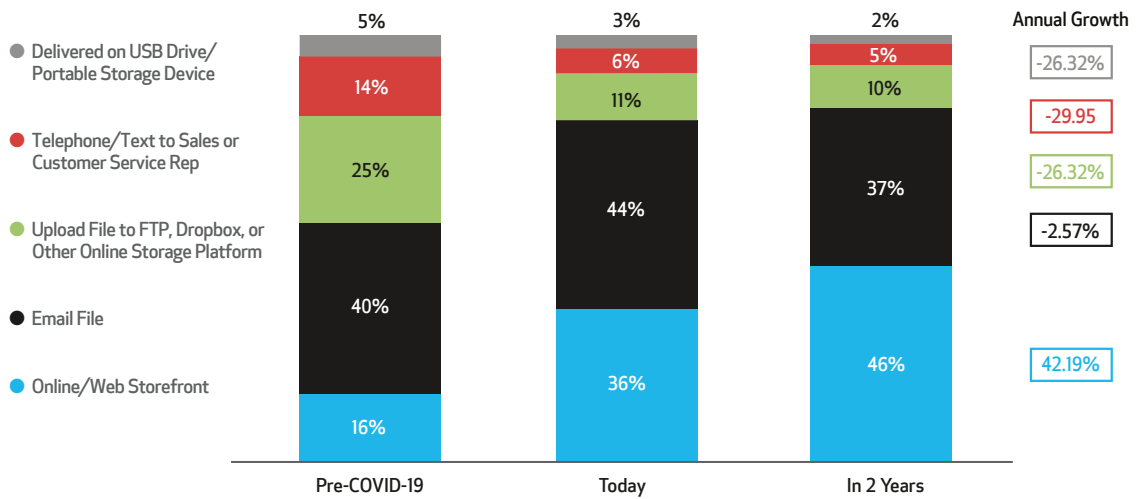


Q. What is the breakdown of how digital print jobs are submitted to your operation pre-COVID-19, today, and what do you expect in two years?
N = 193 Commercial Printers

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Even the increase in remote working environments created across many organizations during the COVID-19 pandemic didn't change the volume of digital work submitted via online portals for commercial printers. In-plant respondents, however, reported a 125% increase pre-COVID-19 to today, increasing from 16% to 36% (Figure 9). A likely explanation for this substantial increase in online ordering among in-plants is that the pandemic forced parent organizations to review and support new workflow processes, such as online ordering, to accommodate remote employees.

Figure 9
Digital Print Job Submission Methods — In-plants



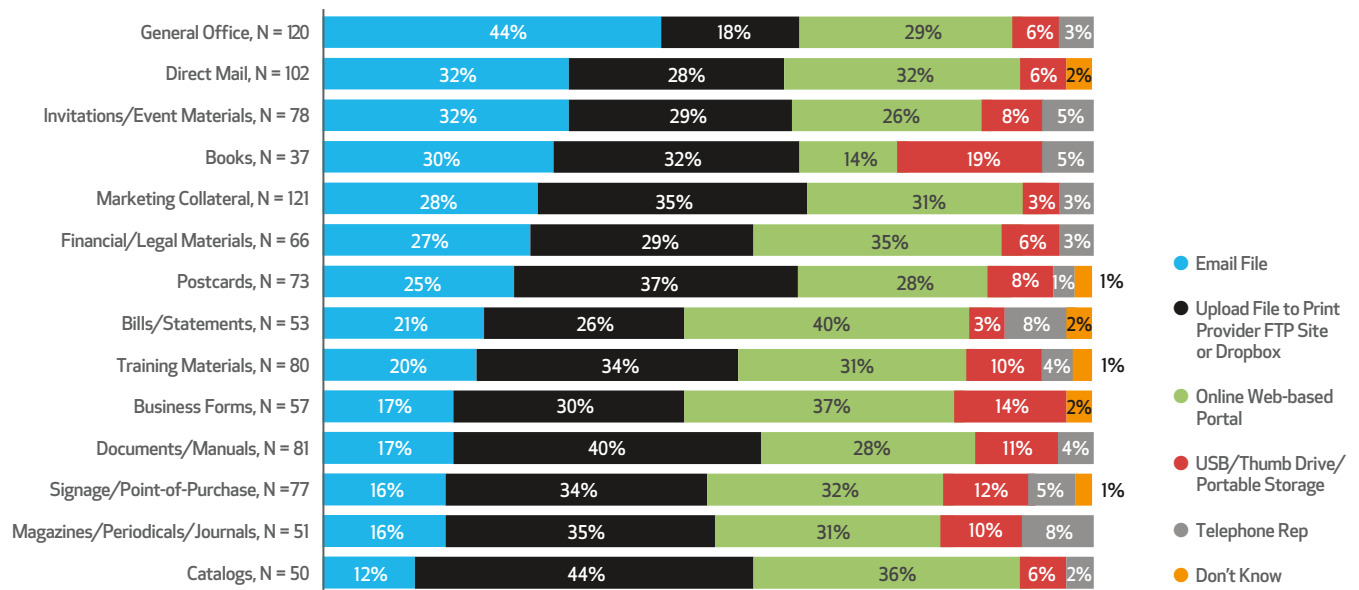
Q. What is the breakdown of how digital print jobs are submitted to your operation pre-COVID-19, today, and what do you expect in two years?
N = 80 In-Plants

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Factors Influencing Buyers' Submission Methods

Communication buyers select job submission methods based on familiarity, comfort level, and the type of job they're submitting. Figure 10 shows the methods used the most by communication buyer respondents for select print applications. While communication buyers use multiple submission methods per application, those that are produced on a more frequent basis (bills, statements, financial/legal materials, and catalogs) are more likely to be submitted through an online portal.

Figure 10
Buyer
Job Submission
Method by Print
Application



Q. Of the print applications you influence or purchase, what is the most common method for submitting a job to your print provider(s)?
Base = Communication Buyers and Influencers.

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

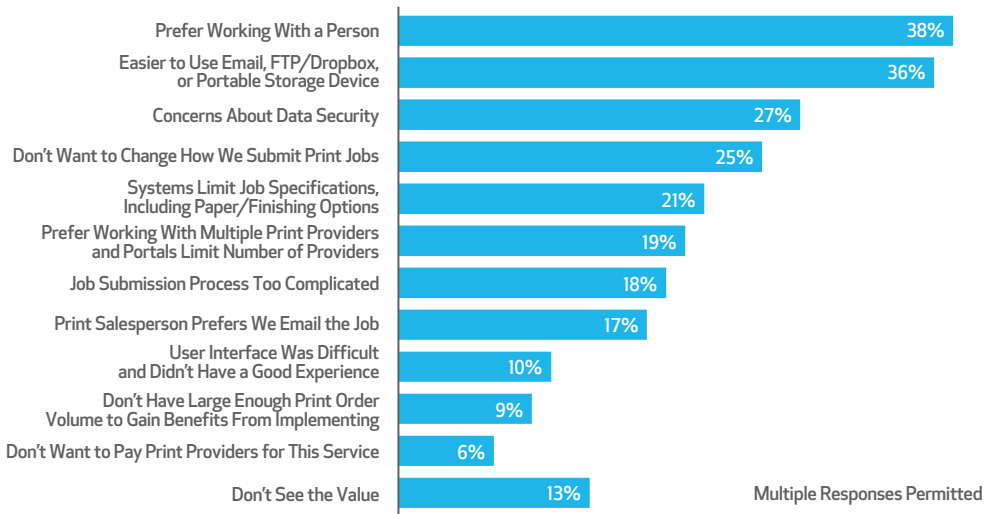
Obstacles to Online Ordering

The survey asked communication buyers who did not submit jobs online to identify the reasons why. The responses recognize those areas print providers should consider addressing to onboard more customers to online ordering, or, alternatively, market other forms of job submission.

Over three-quarters of commercial printers and 72% of in-plant respondents report supplying customers with tools and support to improve file preparation and job submission; 23% of commercial printers and 28% of in-plants report taking no action (Figure 11). These respondents are supporting customers in improving file preparation by auditing customers' job files, providing preflight check lists, supplying printed guides, and hosting educational sessions.

As Figure 11 shows, the top reasons respondents don't submit work via online portals are (1) they prefer to work directly with a person (38%); (2) it's easier to submit jobs via email, FTP, online file sharing services such as Dropbox, or portable storage devices (36%); (3) they have concerns about data security (27%); and, (4) they don't want to change the way they submit print jobs (25%). Few respondents identified not having enough print volume or complicated ordering interfaces as obstacles to submitting print work through online portals.

Figure 11
Reasons Buyers Don't Use Online Portals



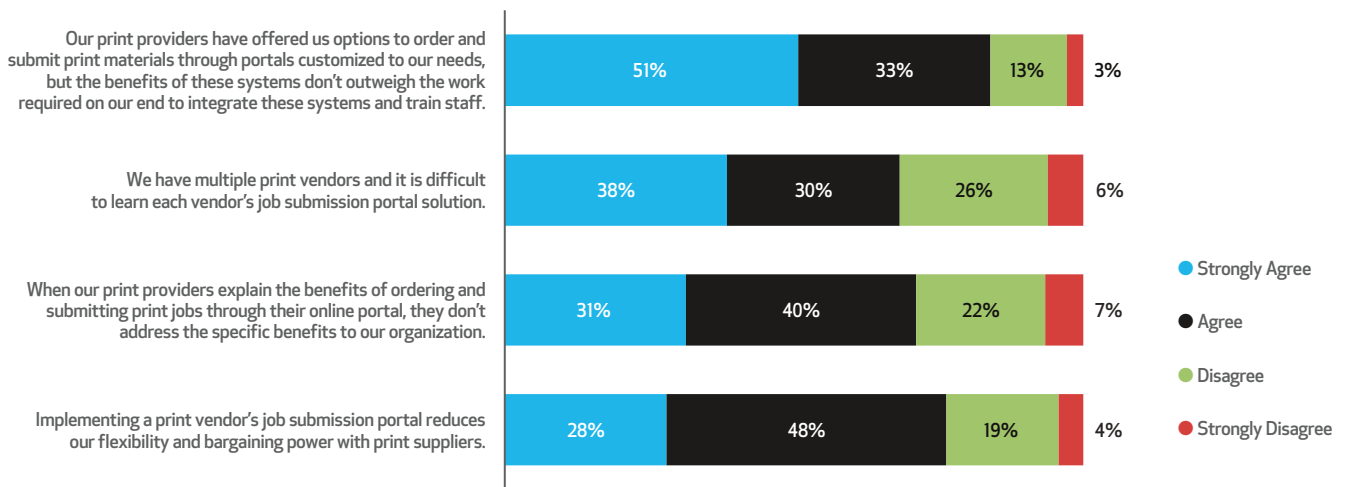
Q. Why don't you submit print jobs via an online portal/e-commerce storefront system?
N = 77 Communication Buyers and Influencers that either do not submit print jobs via an online portal or use multiple job submission methods

Source: Enhancing The Print Customer Connection, NAPCO Research 2021

These survey findings suggest that long-standing buyer habits may be greater obstacles to online job onboarding than any aspect of the systems themselves.

The survey asked questions to determine what factors prevented growth in the use of online job submission. A top obstacle is that buyers believe the benefits delivered by online systems don't justify the effort to implement and train staff to use them (Figure 12).

Figure 12
Obstacles to Buyers Using Online Job Submission Portals



Q. What is your level of agreement with the following statements?
N = 211 Communication Buyers and Influencers
Source: Enhancing The Print Customer Connection, NAPCO Research 2021

Other obstacles buyers report:

- Online ordering portals can reduce the business leverage that comes from in-person negotiations with their vendors.
- Print providers don't explain how the benefits of ordering and submitting print jobs through their online portal can deliver benefits specific to their organization.
- For buyers with multiple print providers, learning and implementing each vendor's job submission solution challenges resources.

Buyers Rely on Multiple Job Submission Methods

Another salient data point on the value of offering multiple methods for job submission is that 92% of communication buyer respondents say it's an important factor when selecting a print provider.

Delivering job submission experiences that meet buyers' needs may require finding ways to improve all forms of job onboarding, such as streamlining and improving email and file upload submission methods to optimize back-end processes, communication, and turnaround times.

Communication buyers' responses offer insights into ways to help improve the job submission experience, which also offers print providers ways to strengthen customer relationships and increase productivity benefits. Buyer respondents want to work with providers that understand their unique challenges and offer specific solutions to solve them. Their priority is improving their objectives, not a print provider's efficiency.

As the survey data indicates, communication buyers want flexibility and simplicity when submitting print jobs. Improving customers' job onboarding experiences starts with understanding their needs and the value that different submission methods offer their organizations.

Conclusion

Job submission is a key part of the customer experience. Many of the communication buyers participating in the survey require multiple methods to submit work. As this research indicates, online portals have not become the dominant method once predicted, and customers demand flexibility, simplicity, and reliability in whatever job submission process is used.

Print providers wanting to increase the volume of print work submitted through their online web-based/e-commerce portals need to better educate communication buyers on the benefits these solutions provide.

It's also important for print providers receiving a high volume of orders via email and file uploads to investigate software solutions that can help to streamline the processing of these orders and improve communications with customers.

About Enhancing the Print Customer Connection

Enhancing the Print Customer Connection is a series of thought-leadership content pieces based on a NAPCO Research survey of communication buyers, commercial printers, and in-plants that was sponsored by Canon.

1. Delivering Client Experiences that Build Competitive Advantage
2. The Job Submission Challenge – Onboarding Your Customers
3. Navigating a New Customer Environment
4. Advancing Productivity and Service Delivery
5. Strengthening the Value of the In-Plant

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