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efficiency & attendance of equities  
seminar program



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Vice President of Sales  
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## **Personalized marketing gets results**

In a world where international events can have a traumatic effect on investor confidence, retaining long-term customers is the name of the game. For those on the frontlines of the stock market, finding the best way to play is just as important.

Take the equities department of Guardian Investor Services, a wholly owned subsidiary of the Guardian Life Insurance Company (Guardian), that uses advanced HP digital publishing solutions to reach audiences for its financial information seminars.

The fourth-largest mutual life insurance firm in the U.S., with \$34.3 billion in assets, Guardian was founded in 1860 and is listed among Fortune magazine's top 500 businesses. With 5,500 employees, over 2,800 financial representatives and 100 agencies nationwide, Guardian and its subsidiaries protect individuals, businesses and their employees with life, disability, health and dental insurance products, and offer 401(k), mutual fund and annuity investment products, and trust services.

A leader in high-tech business solutions, Hygrade was already exploring the potential of online ordering for one-to-one marketing when Guardian asked them to upgrade the equities seminar-mailing program. Through Global Soft Digital Solutions, a digital print and fulfillment firm that relies on HP technology, Hygrade contacted the HP digital publishing solutions team and within a month, presented Guardian with an online ordering system that allowed regional sales directors to create and send their own invitations.

## **A user-friendly invitation website**

Linked to the company's website, the online ordering system for Guardian combines assets like seminar speakers' biographies and photos with the ability to customize

the seminar time, location and mailing list. The four-by-nine-inch folded invitations are printed on a high-speed HP Indigo 3000 press by Global Soft and mailed to 250 to 500 broker dealers within 24 hours.

"The Guardian solution is one where an end-user will sign onto the site, pick the assets that are appropriate for the person who's speaking, integrate their wealth management customer database and send it up in one transaction," says Chris Petro, Global Soft's President and Chief Executive Officer. "It then comes to us, and we use HP's personalization application to integrate the images as well as the data and the output. We print them, we fold them, and we put them in the mail. So for Guardian it's a customized, completely dynamic start-to-finish solution, and it's working wonderfully."

"It's an additional tool for financial representatives to use for a more targeted marketing effect and a more positive success rate," says Phil Masiello, Vice President of Sales for Hygrade Business Group, Inc., which has provided print management services to Guardian for almost two decades. "In the past this would have to be done through a graphics studio. The studio would receive a Word document from one of the reps, then it would go to the head of the equities area, then be sent to a commercial artist, who would set all of the copy for that particular invitation. It took an extended amount of time."

"It's a lot easier to manage, and it's something they can do on their own time," says Marketing Assistant, Brian Brown, who runs the nationwide seminar program from Guardian's lower Manhattan offices. "They have access to the Web 24 hours a day, so it's not something where they have to go through one person that's only there from nine to five, and who's also dealing with 50 to 75 other requests at the same time."

“It’s almost like a substitute for traditional offset printing, but with the ability to do variable imaging and variable text. It was a home run.”

– Phil Masiello, Vice President of Sales for Hygrade Business Group, Inc.



**Efficient process provides time savings and high-quality communications**

The HP digital publishing solution helps maximize efficiency by creating web-standard online templates for marketing materials that can be accessed anytime, anywhere. For regional sales directors in Guardian’s equities department, the resulting freedom to create and mail their own invitations not only reduces the necessary lead time but also provides greater leeway for last-minute changes or additions.

“Before, they would literally have to give themselves three weeks or more before they could send the order to us to produce and mail the cards,” points out Phil Masiello. “Now the representative can go online and put in all the variable text himself, then proof it on the spot so it’s processed immediately.”

As with any major firm, branding and compliance are important issues – and the look of the seminar invitations produced via digital color printing was a key consideration, says Masiello. “This took the place of a high-quality commercial print job. And without affecting quality, we were able to take a piece that was originally done traditionally and put it on HP digital equipment without anybody even noticing a difference in the quality aspect. It’s almost like a substitute for traditional offset printing, but with the ability to do variable imaging and variable text. It was a home run.”

The real-time proofing, personalization and time to market of custom publishing has literally transformed the process of reaching Guardian’s customers with information about upcoming seminars, which previously involved mass mailings that were sent in waves of three. “I was looking for a way of dealing with the number of meetings our sales force has,” explains Brian Brown. “And via Hygrade, I put into their hands, where they could create their own invitations and put in their own information on their own

time, and be able to mail it out by submitting their own mailing list. So it’s basically under their control, and not funneled through one person in the home office. It’s much simpler and much less frustrating.”

“Part of the value of this process is that the client has ownership, as well,” points out Art Manzo, Executive Vice President of Client Operations at Global Soft. “We give them the tools and the templates to build the document, and once it’s built, they own what they’ve created. It’s also seamless to production.”

**Return on investment**

According to Hygrade’s Phil Masiello, Guardian’s new online invitation system is not only far more efficient but is already more popular with the regional sales directors than the previous program ever was. “Response has been really, really good. More people are taking advantage of going onto the site and placing an order this way than were ever involved previously. And the new pieces that we’re putting up will actually enhance that fivefold,” he says.

Results include a substantial savings in time previously spent ordering, printing and mailing invitations — a real advantage for the department’s busy regional sales directors. There’s also been an increase in attendance at the seminars themselves, which feature the firm’s eight top portfolio managers discussing the benefits of everything from long-term investments to tax-free municipal bonds.

The system’s nine new templates are pinpointed marketing pieces that use HP digital publishing solutions to full advantage, allowing Guardian to reach target audiences while retaining full control over output. “These can be used for almost any meeting that our sales force has, such as retirement or investing or client appreciation, not just for a specific meeting with the portfolio managers,” says Brian Brown. “I expect a lot more requests to be coming in.”

# HP digital publishing solutions overview:

## Challenge

- Update Guardian's equities seminar program.
- Boost attendance at seminars.
- Shorten turnaround time for invitation development.
- Allow decentralized, sales force management of process.

## Solution

- On-line ordering system to create, print and send personalized invitations.
- Integration with Guardian's company website and customer database.
- Real-time proofing and personalization.
- HP digital printing for high quality and superior color control.

## Results

- Substantial time savings from production to mailing.
- Increase in seminar attendance.
- Solution adopted by the sales force.
- Maintained brand integrity.
- Delivered high quality, variable data printing.

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