




Presentation materials and video replay will be provided within one week.

Have questions? Use the questions panel  – we'll field them as we go and during the Q&A recap at the end of the call.

Five Reasons You Should Consider a NEW Print On Demand Process

Today's Agenda

- Challenges for Financial Institution Marketers
- Overcoming the Challenges
- Our Solution
- Q&A

Today's Presenters



David Jones, Senior Account Executive, Harland Clarke



Steve Hesse, Director, Web Services, Wright Business Graphics



Gordon Klepec, Vice President, Sales and Marketing, Wright Business Graphics



Debra Corwin, Vice President, Print Solutions, Harland Clarke

Challenges of an Financial Institution Marketer



Challenges of an Financial Institution Marketer

Typical process to mail post cards

- Many steps to follow
- 10 to 21 business days
 - Design
 - Proofs
 - Approvals
 - Print
 - Mail
- **Two to five hours per piece**

*Complex
Time-consuming*

LOAN OFFICER Step 1

- Loan officer wants to co-brand with their **Realtor** partner
- Emails request to Marketing

MARKETING Step 2

- Schedule time to develop template
- Emails PDF to **loan officer** for approval

LOAN OFFICER Step 3

- Emails **Realtor** PDF for approval
- Emails changes or approval back to **Marketing**
- Fills out Realtor Co-branding approval form to **Realtor**

MARKETING Step 4

- Makes changes to postcard
- Emails **Loan Officer** updated PDF of postcard

LOAN OFFICER Step 4

- Emails **Realtor** updated PDF for approval
- Sends final approval to **Marketing**

REALTOR Step 5

- Signs, scans and emails/mails **Realtor** co-branding agreement

MARKETING Step 6

- Emails request for mail list to be scrubbed against company Do Not Contact list
- Emails vendor scrubbed list with PDF to complete mailing - or - sends PDF of postcard to print vendor

PRINT VENDOR Step 7

- Prints and ships postcards to **loan officer**

LOAN OFFICER Step 8

- Prints labels and applies to postcard along with stamp - 1-3 hours
- Takes postcards to post office for mailing

A Better Way

Improved process to mail post cards

- Fewer steps to follow
- Fewer business days
 - Design
 - Proofs
 - Approvals
 - Print
 - Mail
- **20 to 30 minutes per piece**

✓ *Efficient*
✓ *Self-service*
✓ *Compliant*

LOAN OFFICER Step 1

- Logs in to storefront
- Selects postcard from library
- Postcard is auto filled with **LOAN OFFICER** contact info and photo options
- **LOAN OFFICER** selects Realtor logo and headshot from library or uploads a new one
- **LOAN OFFICER** uploads home info, photos, etc.
- **LOAN OFFICER** uploads mailing list
- **LOAN OFFICER** submits order and sends approval request to the Realtor

REALTOR Step 2

- Receives email requesting approval of postcard and accepts company marketing agreement within email

MARKETING Step 3

- Marketing receives order and approves, denies, or edits directly within storefront

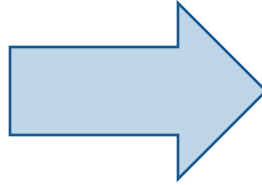
PRINT VENDOR Step 4

- Receives order, scrubs list against Do Not Contact which is automatically added to each postcard along with postage

A Better Way

FROM:

- Up to 50 hours
- Manual system
- Many steps
- Frustrating



TO:

- Less than three hours
- Reduced approval time
- Reduced marketing involvement
- Easy

Introducing BRAD from Harland Clarke

BRAD

BRAND RESOURCE & DISTRIBUTION

- BRAD = **B**rand **R**esource **A**nd **D**istribution
- Harland Clarke's **new** customized online self-service portal.

BRAD enables you and your branches to print all your branded marketing materials – on demand – quickly and easily.

**Demo:
BRAD from Harland Clarke**



Five reasons BRAD improves your print on demand process ...



Harland Clarke Case Studies



BRAD from Harland Clarke



Q&A Wrap Up

Type your question in the questions panel 

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