



## **ING Forum Agenda** **Loews Ventana Canyon Resort** **March 14-17, 2017**



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|---|---|
| <b>Monday March 13</b><br>3:00pm – 6:00pm | <i>Trustees Only for Afternoon Board Meeting, Sabino Room</i><br>ING Board of Trustees  |
| <b>Tuesday March 14</b>                   | <i>Meetings – Catalina Ballroom</i><br><b>All Members and Partners Welcome</b>  |
| 7:30am – 8:00am                           | Continental Breakfast – <i>Foyer JKL</i>  |
| 8:00am – 8:30am                           | Welcome, Dave Henkel, ING President<br><b>ING Financial Review</b> , Renee Durre, Allison Payment Systems,<br>ING Treasurer<br>Member/Partner Introductions   |
| 8:30am – 9:15am                           | <b>"2017 Trends on Software."</b><br>Dan Adler, CEO, DA Digital   |
| 9:15am – 9:30am                           | <b>New Member Intro</b><br>Steve Linsenmeyer, CEO, CMS, Inc.<br>Tim Cicchese, CEO, Premier Graphics   |
| 9:30am - 10:00am                          | <b>TRANSFORMATIONS</b><br>Adam Armstrong, Transformations   |
| 10:00am – 10:30am                         | Break – Foyer JKL   |
| 10:30am – 11:00am                         | <b>"It's Time to go Omni-Channel"</b><br>Richard Lloyd, V.P. Sales, GMC Software  |
| 11:00am – 11:30am                         | <b>"Helping drive your business outcomes"</b><br>John Kline, VP Product Mgmt & Solution Engineering, Pitney Bowes   |
| 11:30am – 12:00pm                         | <b>Xerox</b>  |
| 12:00pm – 1:00pm                          | <b>Lunch Peer2Peer Round Table Discussion</b>   |
| 1:00pm – 2:00pm                           | <b>ING Membership Performance and Perspective Report</b><br>Matt Swain, Senior Director, Keypoint Intelligence - InfoTrends<br>Results of the InfoTrends study on ING member critical business areas of technology, software, hardware and infrastructure, services, staffing and trends. |



Forum  
Tuesday March 14th cont.

2:00pm – 2:30pm

Ricoh

2:30pm – 3:00pm

Memjet

3:00pm – 3:15pm

Break

3:15pm – 3:30pm

**New Member Intro**

*Kurt Smallhoover, CEO, Pittsburgh Mailing  
Charles Buchanan, SVP, Summit Direct*

3:30pm – 4:00pm

**“Riso Customer Case Study: Expand your print applications without changing your workflow”**

Margaret Curry, Senior Manager, Strategic Alliances, Riso

4:00pm – 5:00pm

**“Topics from 2017 Member Profiles on Trends and Strategic Direction” Member Open Forum**

Fred VanAlstyne, Content Critical Solutions

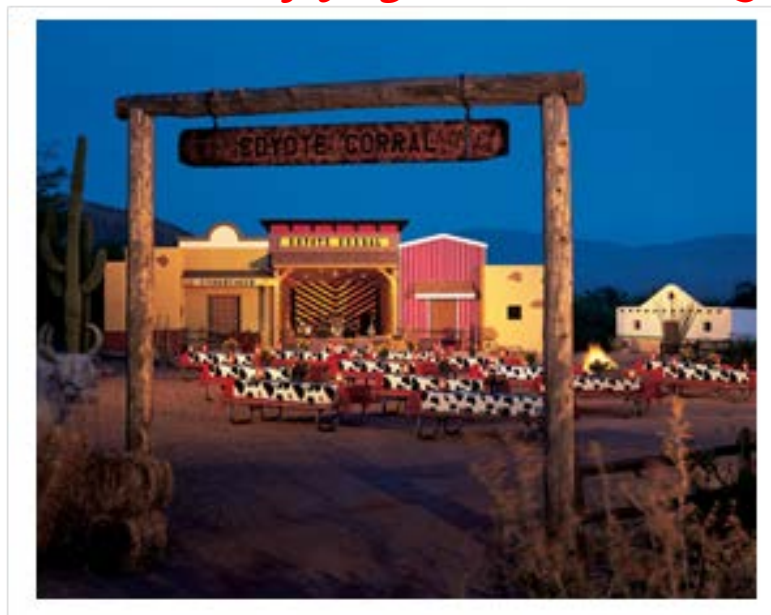
6:30 – 9:30pm

ING FORUM WELCOME DINNER AND COCKTAILS

## ***COYOTE CORRAL***

***All Attendees and Guests Welcome***

***Wear your best western attire, come prepared to rope, shoot and toss while enjoying cocktails and BBQ***





**2017 INg Forum Agenda**  
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**Wednesday March 15<sup>th</sup>**      *Members and Partners for meetings, All attendees and guests  
Catalina Ballroom*

7:30am – 8:00am      Breakfast – Foyer JKL

8:00am – 9:00am      **“Quality Assurance and Compliance Standards;  
Is Your Company Covered”**  
Eric Ratcliffe, 360 Advanced

Compliance is on the rise; what standards are best for my business to grow and what will my client ask for next? During this session you will understand the difference between all of the Quality Assurance and Compliance Standards being demanded in your industry and what we see as best practices to stay on top of your clients requirements. We will also break down the requirements for SOC 1, SOC 2, ISO 27001, PCI, HIPAA and HITRUST; we will discuss where overlap exists between these standards and why integrating your compliance audits will reduce effort and cost for your business. Lastly, we will demonstrate why these Audits, Assessments, and Certifications can be a marketing tool that is losing you money if you don't already have them in place

9:00am – 9:30am      **"What's New in Canon Inkjet"**  
Guy Broadhurst, VP, Technology & Client Solutions, Canon  
Sheri Jammallo, Sr. Advisor, Marketing, Canon

9:30am – 9:45am      Break

9:45am – 11:45am      **Keynote Speaker Tim Wackel**  
**Noted Sales Speaker, Sales Trainer and Sales Expert**  
**Stop Pitching, Start Solving**  
**Helping Customers Discover What They Really Want**

Many sales people today have never been taught how to properly prepare for a sales call. They simply recycle the same sales conversation over and over hoping to find someone waiting to buy. Anyone can make lots of calls, and it takes almost no skill to convert a huge number of contacts into a sparse number of opportunities. But if you want to significantly increase your production, you'll need to do a better job of making every conversation count. Proper preparation builds your confidence, saves time, impresses the customer and leads to better opportunities. It spells success!



11:45am

Adjourn

**AFTERNOON ON YOUR OWN**

**Non ING Sponsored Suggested Activities**

Golf – The Lodge at Ventana Canyon, tee time 12:30pm

Bike – Leave from Lobby

6:00pm – 9:00pm

Cocktails and Dinner

Keva Patio



***All Forum Attendees and Guests  
Heavy hors d'oeuvres and Cocktails***



## 2017 INg Forum Agenda Loews Ventana Canyon Resort March 14-17, 2017

- Thursday March 16th**      *Members and Partners for meetings, All attendees and guests  
Catalina Ballroom*
- 7:30am – 8:00am      Breakfast *Foyer JKL*
- 8:00am – 8:30am      **“Production Inkjet on a Roll: Introduction to Standard Finishing Systems & Update on Technologies Relevant to INg Members”**  
Mark Hunt, Director Strategic Alliances, Standard Finishing
- 8:30am – 8:45am      **New Member Introduction**  
Bill Murray, CEO, DataProse  
Mark Cloutier, SVP, Sale, DMM, Inc.
- 8:45am – 9:45am      **“Enterprise Risk Management”**  
JP Thomas, CEO, Allison Payment Systems  
Panelist: Renee Durre, COO, Allison Payment Systems  
Mike Hennessy, CIO, RevSpring  
Mary Keating, VP, I.T., Cathedral Corporation  
Gretchen Renaud, VP, Ops, Print Mail Systems
- Enterprise risk management is methods and processes used by organizations to manage risks and seize opportunities related to the achievement of their objectives. ERM provides a framework, which typically involves identifying particular events or circumstances relevant to the organization's objectives (risks and opportunities), assessing them in terms of likelihood and magnitude of impact, determining a response strategy, and monitoring progress. We will go deeper into ERM specifically for our industry and look specifically around INg member standards
- 9:45am – 10:15am      **Screen USA**
- 10:15am – 10:45am      Break – *Foyer JKL*
- 10:45am – 12:00pm      ***Employment Law in the Trump Era***  
Paul E. Lehner  
Adducci, Dorf, Lehner, Mitchell & Blankenship, P.C.
- Donald Trump will be almost two months into his Presidency when we gather in Tucson. One prediction seems clear: Changes are coming, and they will be felt in employment law as well. Paul Lehner returns to present an employment law overview, with an update on what the Trump Administration has accomplished to date and what we may expect from the 45<sup>th</sup> President and the Republican-controlled Congress.
- 12:00pm – 1:00pm      Lunch – Peer to Peer Round Table Discussion
- 1:00pm – 1:30pm      Bell and Howell
- 1:30pm – 1:45pm      **New Member Introduction**  
Robert Tokar, CEO, Wolverine



Christine Soward, CEO, DMS Ink

1:45pm – 2:15pm

**“5 Reasons Why Post-Composition DRIVES Revenue”**  
Mary Ann Rowan, CSMO, Solimar Systems

2:15pm – 2:30pm

**New Member Introduction**  
Greg Waite, President, Diamond Marketing  
Jono Huddleston, CEO, DNI, Corp

2:30 – 3:30pm

**Finishing Session – Open Forum Discussion**  
**John Delaney, OSG, Moderator**

Member companies will pose questions to the panelist about:

- Finishing equipment to attach to a continuous feed IJ box (ex: unwind/rewind, inserting, punching and perfining)
- Finishing equipment to support cut-sheet IJ
- Intelligent inserting machines



3:30pm

Adjourn

4:00pm-7:30pm

**Open-aired jeep Tours through the Sonoran Desert with a Native American or Cowboy Guide to entertain you as you learn about the “Wild West”. Your ride will take you to a nature trail to learn more about the local terrain. The tour will close with a desert dining location where you will enjoy live music, bonfire, beer/wine or Prickly Pear Margaritas and a full BBQ Buffet.**



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**Friday March 17th** *Members and Partners for meetings, All attendees and guests*

7:30am – 8:00am

Breakfast – *Foyer JKL*

8:00am – 8:30am

***“Decomposition – recycling the document for omni-channel distribution” A Green Journey***

Harvey Gross, Crawford

8:30am – 9:00am

***An ING Member Solution Offering: FSSI’s letterStreamOne***

Jennifer Dietz, President, FSSI

9:00am – 9:30am

***“The Impacts of 2017 on Mailers for Years to Come”***

Bob Schimek, Senior Director of Postal Affairs, *Satori Software*

9:30am – 10:00am

Break

10:00am – 11:00am

***“Planning for RFP Success with Proven Strategies”***

**Romeyn Stevenson, CEO, Ashburnam**

Romeyn is hired by many large corporations seeking to outsource their print, mail and electronic document delivery on both the transactional and direct mail side. This presentation will address approaches to targeting potential RFP opportunities and successfully submitting a bid under limited time lines with the chance of increased downstream submissions becoming more effective.

11:00am – 12:00pm

***“Acquisition and Integration Planning”***

Pat Maurer, President, Apex Revenue Technologies,  
Moderator

12:00pm – 1:00pm

Closing Lunch  
Cascade Terrace

***All Forum Attendees and Guests***

