

The graphic features a vibrant, abstract design at the top with wavy, overlapping bands of red, orange, and yellow, resembling a stylized sunset or a modern architectural structure. Below this, the text "DMA·08" is prominently displayed in a large, bold, sans-serif font. The "DMA" is in a light yellow color, and the "08" is in a bright red color. The background of the lower half is a solid black, which makes the text stand out. At the bottom, there are more wavy bands in shades of purple and red.

# DMA·08

## Conference & Exhibition

October 11 – 16, 2008  
Las Vegas Convention Center • Las Vegas, Nevada

[www.dma08.org](http://www.dma08.org)



# **Strategic Fulfillment Marketing Program Invigorates Colonial Life**

**15 October 2008**

**Tom Bise, Vice President, Colonial Life**

***and***

**David Lowndes, Product Development Director,  
Iron Mountain Fulfillment Services**



# Introductions

- Tom Bise  
Colonial Life
- David Lowndes  
Iron Mountain Fulfillment Services



# Learning Objectives

- Learn about marketing collateral realities and communication challenges
- Learn from a real case study the benefits of a strategic collateral management program
- Learn how to implement best practices that will optimize your communications



# Marketing Collateral Realities

- Significant portion of company budget
- Printing costs: 1-3% company gross revenues
- Collateral is routinely under utilized
- \$20 billion of printed material discarded each year
- Streamlining production reduces costs by 30%



# Success Factors: Response Rates

- Adding name 44%
- Adding color 135%
- Customized content 500%

Source: Rochester Institute of Technology





## Success Factors: Other Rates

- 34% Reduction in response time
- 25% Increase on order value
- 48% Increase in repeat orders
- 32% Increase in revenue

David Broudy/Professor Frank Romano: Variable Printing Study



# Communication Challenges

- Must communicate consistent brand message
- Generic material does not allow targeting
- Targeted material can be expensive to develop, produce





# Communication Challenges

- Limited internal marketing resources
- Increasing pressure to do more with less
- Workforce becoming more distributed



## Situation and Issues

- Situation: In 2005, Colonial Life experienced significant distribution channel growth, new product launches and expanded industry regulatory guidelines
- Issue: Existing fulfillment system began to buckle with increased usage
- Issue: Personnel resources were at capacity trying to keep up with increased number of fulfillment requests



# Goals

*Implement a Strategic Collateral Management Program:*

- Increase Efficiency
  - Maximize company's existing investments
  - Improve productivity
- Improve Effectiveness
  - The right material to the right person at the right time
- Maintain Compliance
  - Agents order only what they are licensed to sell



# The Right Stuff

*Colonial Life researched prior to engaging with a partner:*

- Started with an audit and review of usage trends
- Identified materials that could be transitioned to print on demand or made obsolete
- Dedicated a resource for tracking, reporting and ongoing document assessment
- Issued RFP
- Conducted site visits



# Why Iron Mountain

- System-Driven Business Rules
- Virtual Library
- Search Capabilities
- Print-on-Demand 'fail-over' Solution
- Reporting Capabilities
- Team Approach
- Employee Incentive Program



## Benefits: Increased Efficiency

- Reduced storage, backorders and offset printing expenses through use of print-on-demand
- Reduced multiple or redundant shipping charges through greater order accuracy
- Increased ROI through accurate usage tracking, which allows better reorder point forecasting and budget management
- Reduced internal staff time





# Feedback

- *This was **GREAT!!!** What a pleasure to place this order!!!*  
--Brenda Cox
- *This is the best thing that I have seen in years from Colonial! **Not only is everything now included in one convenient place, but I can see everything as a PDF to decide if it is exactly what I want or not.** I have ordered small batches so many times because I didn't know what it contained. Thanks so much for all of this.*  
--Rick Abbott
- *I just wanted to say WOW on a job well done. I have been waiting for this and you have outdone yourselves once again. I was able to place my order and search very effectively. Again, **AWESOME** job. I am so excited.*  
--Samantha Myers



# Building a Successful Partnership

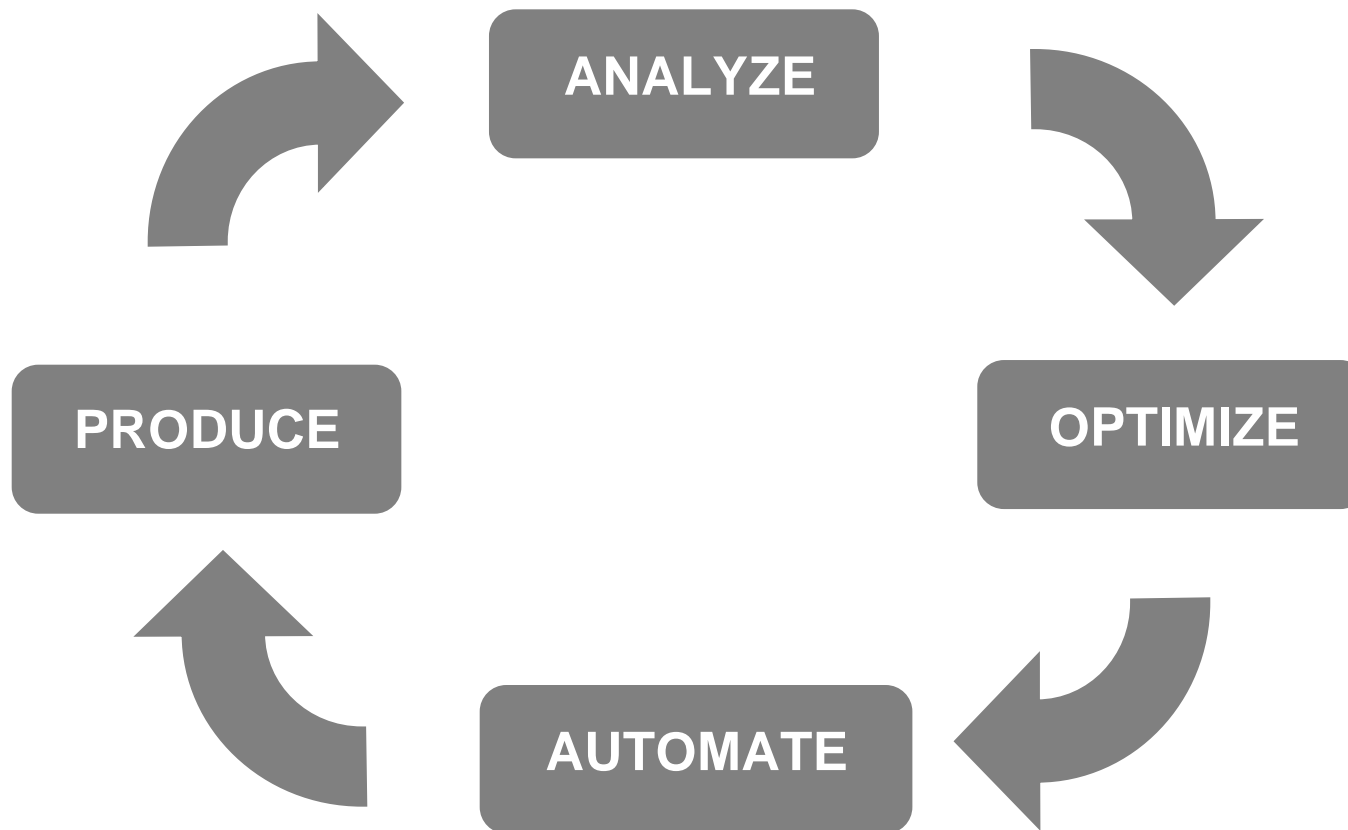
- Open communication
- Dedicated resources from Colonial Life
- Both parties understand expectations
- Goal alignment
- Understanding the ROI value, not just line-item cost savings



# Communication Optimization

- Effectiveness
- Efficiency
- Compliance

# Communication Optimization





# Communication Optimization

Analysis provides the intelligence and learning

Optimization helps determine the what and how

Automation ensures accuracy, speed, compliance

Production delivers the materials



# Summary

A strategic collateral management program, such as Communication Optimization, will enhance control, increase returns and reduce costs.





# Q & A



# About Iron Mountain Fulfillment Services

- Collateral and digital print management solutions
- Focus on mission-critical, high-value communications
- Improving effectiveness, efficiency, compliance
- Secure, accurate, immediate, reliable
- National coverage with dedicated facilities



## About Colonial Life

- Colonial Life is a market leader in voluntary benefits, providing solutions in one neat package: excellence in communications, enrollments, service, and personal insurance products and services that make benefits count for employers and their employees alike.



# Contact Information

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