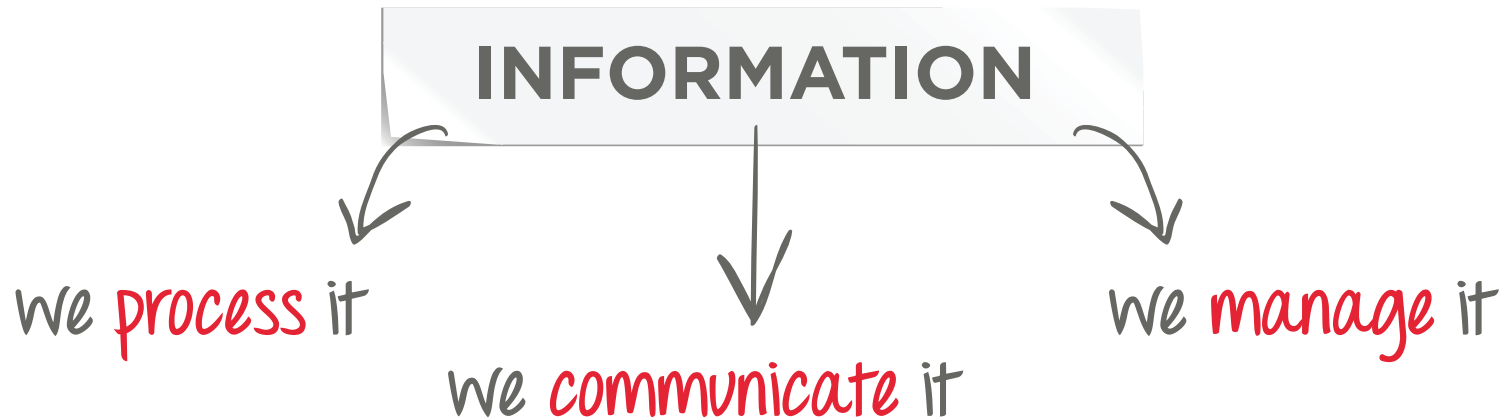


# WHAT WE DO

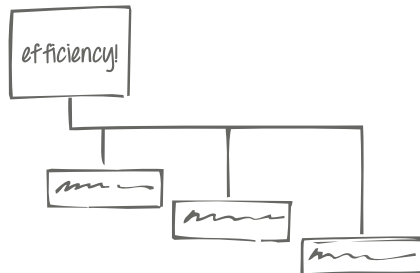
# WHAT DO WE DO?

...and why do we do it?



# WHY DO CLIENTS LOVE US?

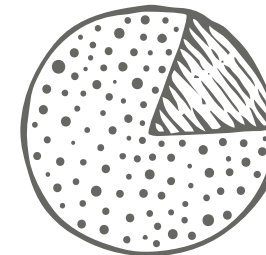
IMPROVE THE EFFICIENCY OF WORKFLOWS



MORE RETURN ON MARKETING INVESTMENT



REDUCE COSTS FROM FIXED TO VARIABLE



# HOW DO WE DO IT?

## Our core services

IMPROVE THE **EFFICIENCY** OF  
WORKFLOWS

**MORE RETURN** ON MARKETING  
INVESTMENT

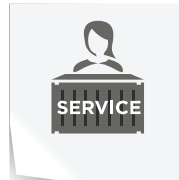
**REDUCE COSTS** FROM FIXED TO  
VARIABLE

*business services*

*print & media*

**SERVICE DESKS**

INHOUSE PRINT & SCANNING CENTRES



**OUTSOURCING**

BUSINESS PROCESS OUTSOURCING



**WEB-TO-PRINT**

FAST ONLINE BUSINESS PRINTING



**DIGITAL PRINT**

HIGH-DEFINITION DIGITAL COLOUR PRINTING

# WHO DOES IT?

Meet Arthur de Vries from Service Point Netherlands...

## FACT FILE:

**JOB:** SERVICE DESK MANAGER  
**CLIENT:** SHELL HQ, DEN HAGUE  
**SERVICES:** IN-HOUSE PRINTING & SCANNING

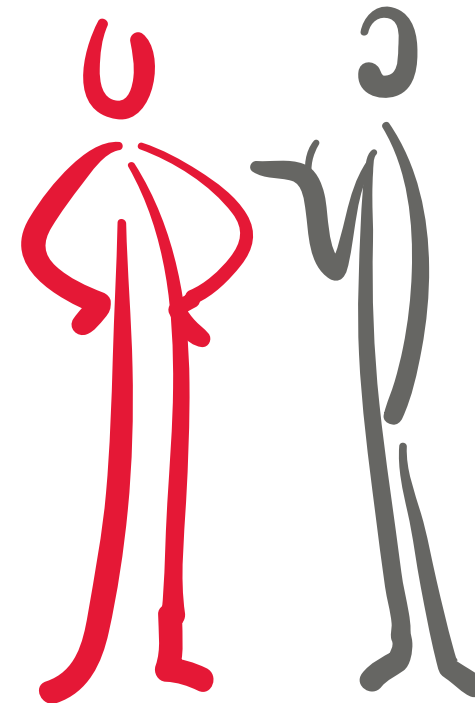
*"What ever they need!"*

**PRODUCTS:** REPORTS, TRAINING MANUALS,  
PRESENTATIONS, BANNERS, SIGNAGE

*"Recently we delivered a high quality  
digital colour product from Service  
Point Sweden."*

**PHILOSOPHY:** "IN THE MORNING WE SHOULD COME  
IN WHISTLING, IN THE EVENING WE SHOULD GO  
HOME TIRED, BUT SATISFIED

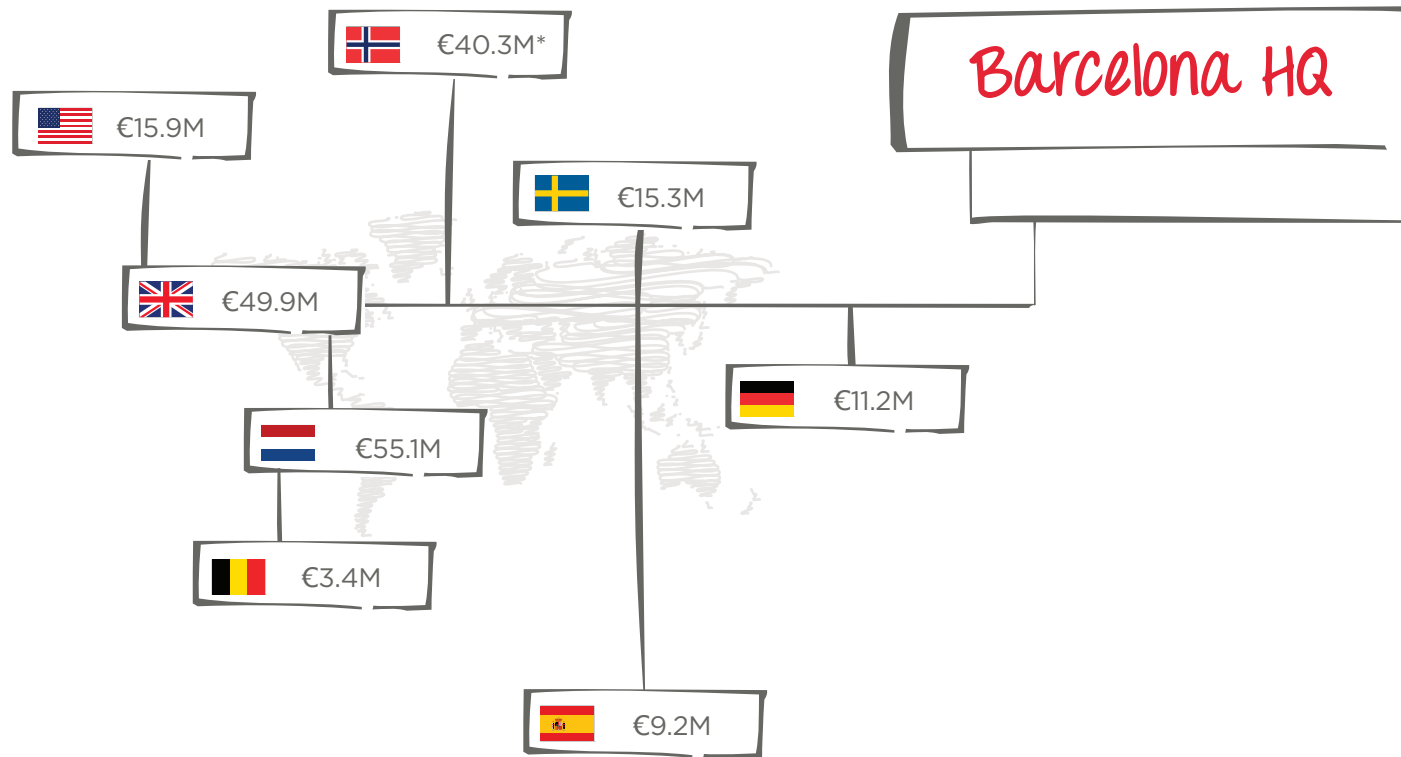
*"servicing the client is  
always key!"*



# STUUCTURE & STRATEGY

# OPERATIONAL STRUCTURE

At a glance facts

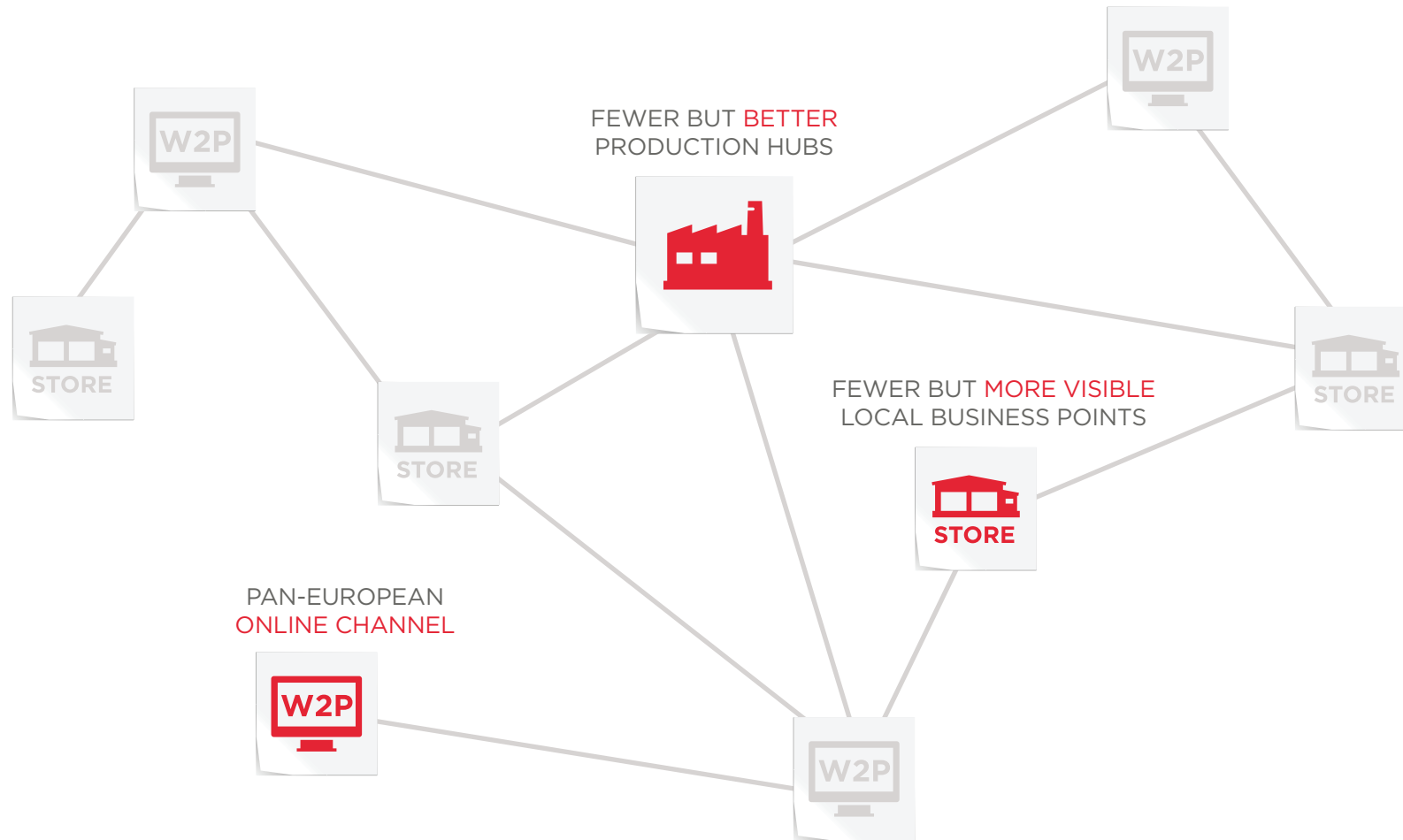


- 2013E SALES €189-200M
- EBITDA €13-15M
- 50% CONTRACTED BUSINESS
- 10% ARE MULTINATIONAL CONTRACTS
- 94 PRODUCTION CENTRES
- 474 INHOUSE SERVICE DESKS
- 7% BUSINESS ONLINE
- 1902 EMPLOYEES
- 30,000 ACTIVE CLIENTS
- 3308 DIGITAL PRINT PRESSES
- 162 SCANNERS
- HONG KONG & RUSSIA BRANCHES

\* Country sales 2012  
Panel sobre Tecnología y Telecomunicaciones

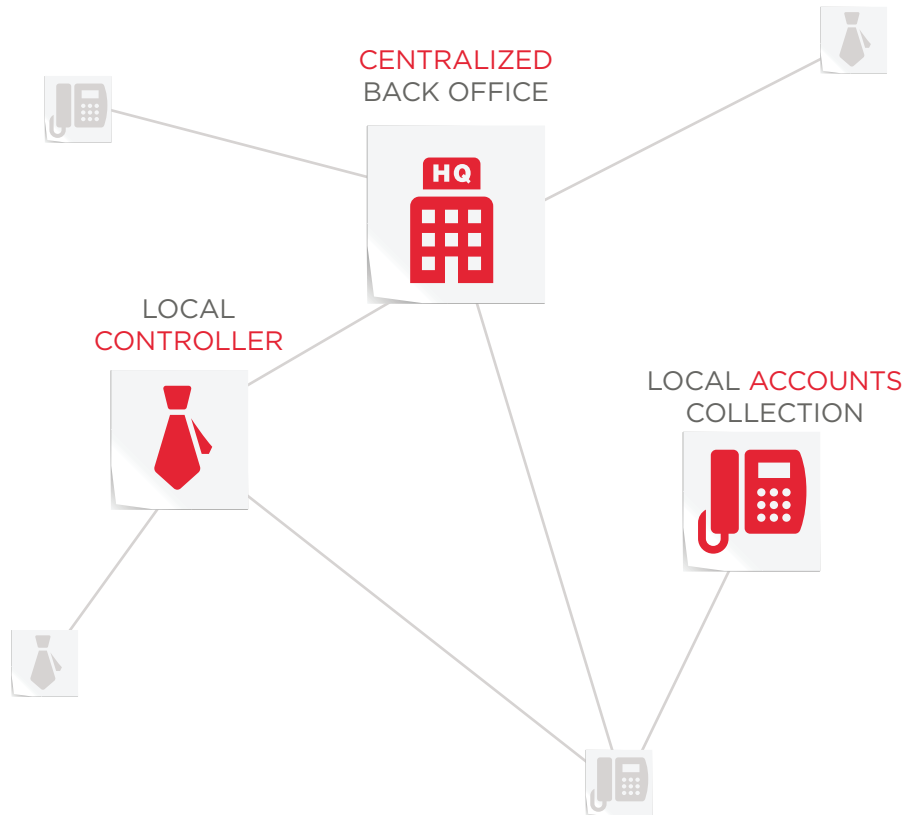
# OPERATIONAL STRATEGY

Rationalisation of production - and interconnection of channels



# OPERATIONAL STRATEGY

## Rationalisation of the Back Office



## OPERATIONAL SAVINGS

REDUCED COSTS, INCREASED PROFITABILITY

	NOW	MEDIUM TERM
Gross Margin	64-65%	64-65%
Sales & Marketing Costs as % of Turnover	7-9%	7-9%
Production Costs as % of turnover	42-44%	38-41%
Back Office Costs as % of Turnover	6-8%	4-6%
EBITDA as % of Turnover	6-8%	12-14%



# OUR 5YR PLAN

# PRODUCT STRATEGY

## Strategic versus Traditional Product Development

### STRATEGIC PRODUCTS:

- *DIFFERENTIATED*
- *CONTRACTED*
- *VALUE-ADD*

MANAGED SERVICES

BUSINESS PROCESS OUTSOURCING

HD DIGITAL COLOUR PRINT

DISPLAY GRAPHICS

BOOKS ON DEMAND

PHOTO SERVICES

CFI

MARKET EDGE

WEB-TO-PRINT

E-COMMERCE

STORE

### TRADITIONAL PRODUCTS:

- *PRICE WAR*
- *ONE-OFF*
- *COMMODITISED*

OFFSET PRINTING

BLACK AND WHITE PRINTING

DATA ENTRY

SIMPLE SCANNING

PRINT EQUIPMENT

FRANKING

MAILROOM

HIGH-STREET FACTORIES

TRANSACTIONAL SALES

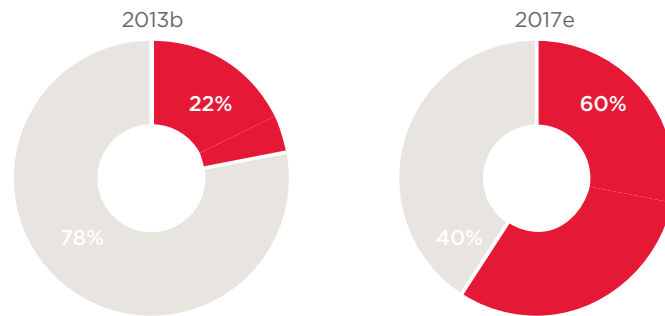
TELEPHONE ORDERING

PHOTO COPYING

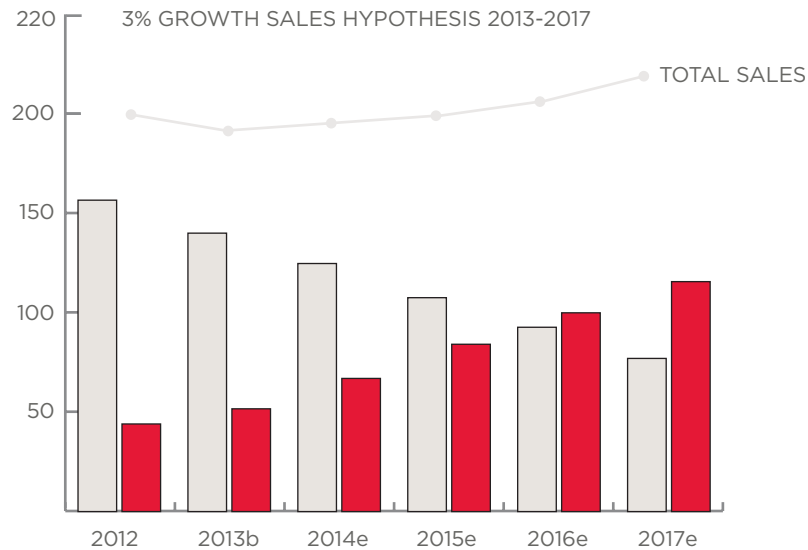
# STRATEGIC SALES PLAN

## Transition to Strategic Products

WEIGHTING FROM TRADITIONAL TO STRATEGIC SALES 2013-2017

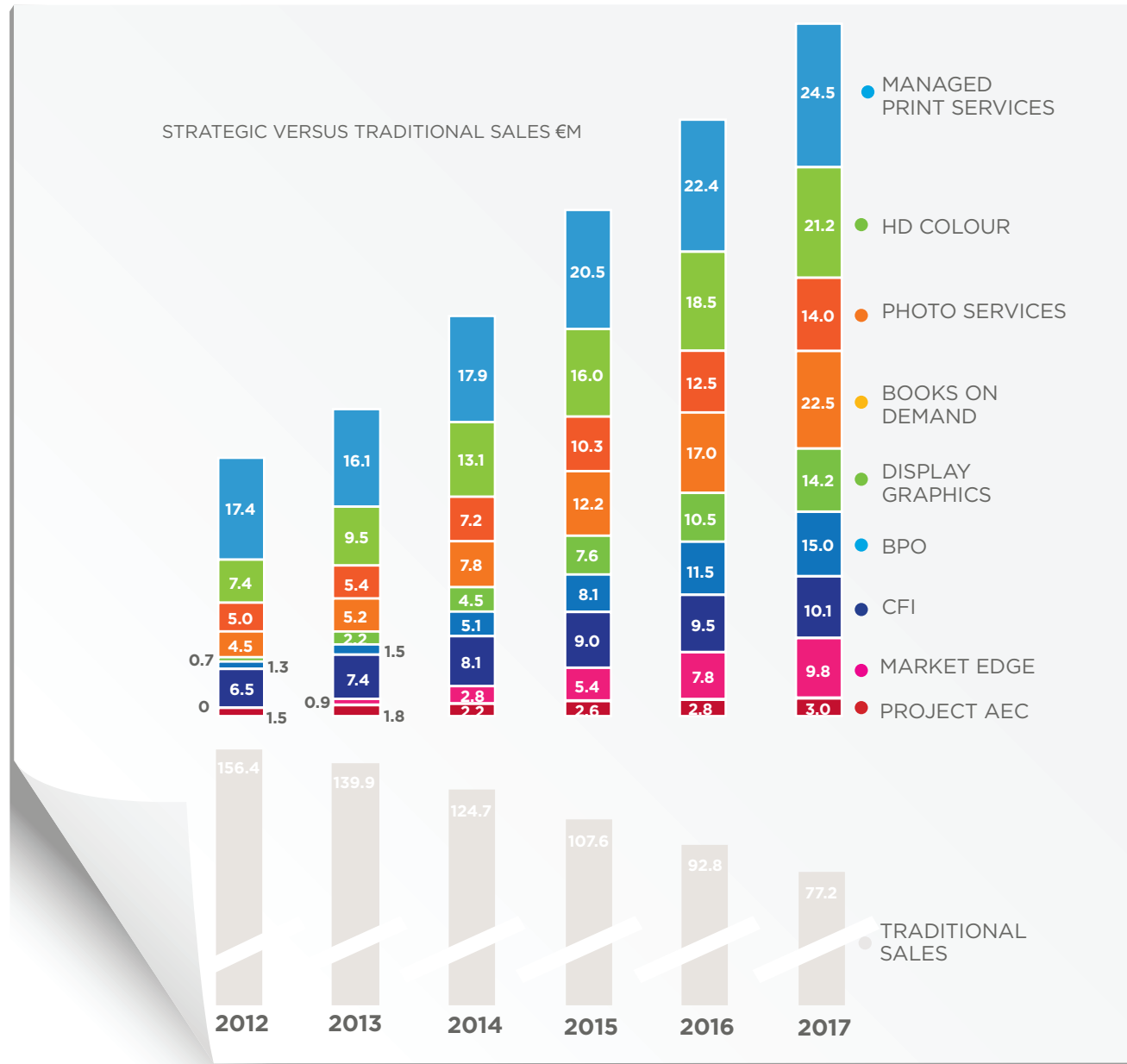


- PLAN FOR MODEST 3% YOY SALES GROWTH
- FALL IN TRADITIONAL PRINT ACCOUNTED FOR
- GROWTH IN STRATEGIC PRODUCTS
- RATIONALIZATION IMPROVES GROSS MARGIN
- REDUCED COST BASE FINANCES NEW PRODUCT & MARKETING DEVELOPMENT
- *THE RIGHT PRODUCTS*
- *THE RIGHT MARKETS*
- *THE RIGHT CHANNELS*



# PRODUCT DEVELOPMENT

## 5 year Product and Development Plan

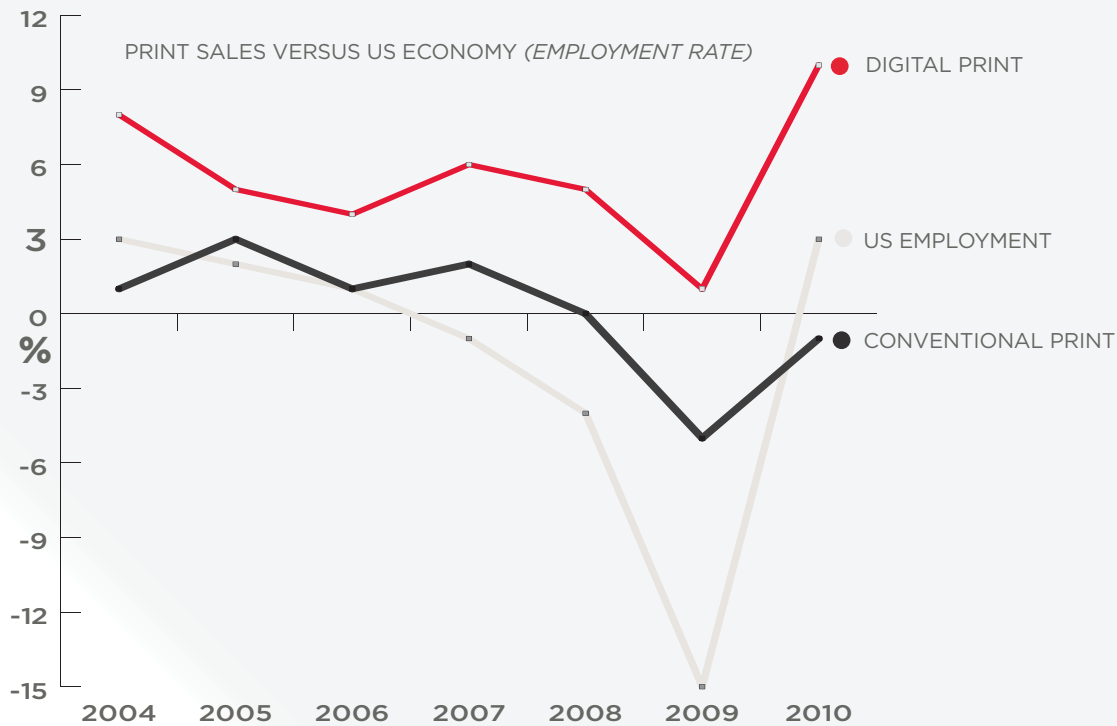


- TARGETED PRODUCTS
- TARGETED MARKETS
- TARGETED TECHNOLOGIES
- TARGETED CHANNELS
- GLOBAL DIVISIONS
- *MUST BE CLEVER*
- *MUST BE COLOUR*
- *MUST BE QUICK*

# CONCLUSION

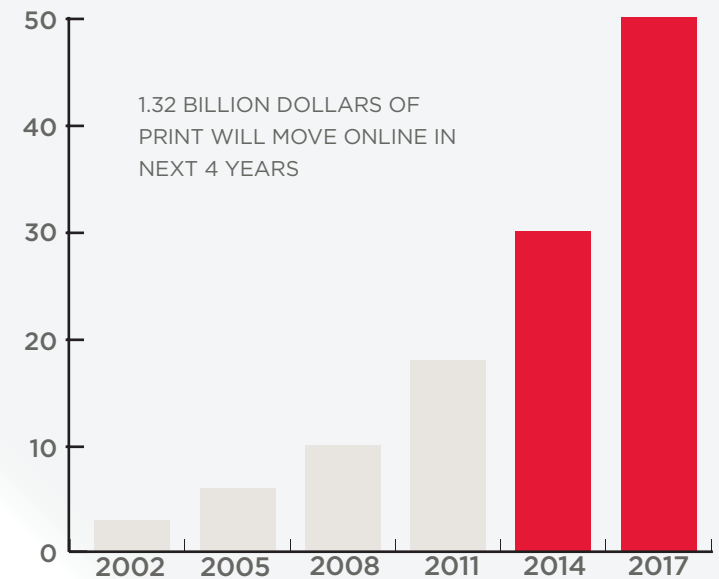
Service Point operates in a cyclical, but growth business

## DIGITAL PRINT



Growth in Digital Print compared to conventional print and macro-economics, represented by US employment figures (Source: "Printing Industries of America" research)

## ONLINE PRINT



Percentage of Global Print Orders being placed through a website (source: "Printing Industries of America")

**THANK YOU**