

# **Communication Papers Brand Re-launch**

# February 13, 2013





# **Agenda**





- Objective
- Deliverables
- Approach
- Benefits
- Timing
- Next Steps



## The situation & opportunity

- Georgia Pacific Communication Papers is re-launching its product line into the marketplace.
- The opportunity exists to create customer excitement via an impactful and consumer/shopper focused integrated launch plan.
- GP Communication Papers can grow share of mind within its key consumer segments.
- GP Communication Papers can make a significant business impact by leveraging the re-launch to maximize sales fundamentals. Specifically, filling distribution voids and expanding shelf placement.





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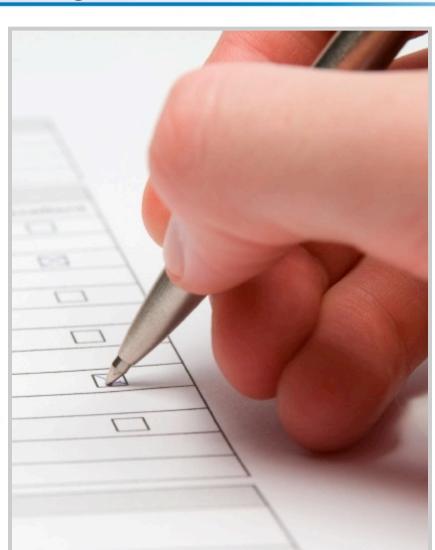


## **Objective**



- To establish a clear, meaningful brand personality
- To create and deliver an effective GP Communication Papers re-launch plan that:
  - Increases share of mind with consumers
  - Ignites our customer's attention and interest
  - Delivers a new and exciting look and feel to the category through improved packaging
  - Simplifies the shopping experience
  - Fills key distribution voids!
- To grow GP share, distribution and sales/profits in the category through this cohesive, effective launch program

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## **Deliverables**



- Clear GP Communication Papers brand positioning statement
  - Points of differentiation
  - Brand Equity
- Integrated Brand Launch Plan
  - Advertising & Consumer Plan
  - Brand Goals/Objectives Share targets, Sales deliverables
- Identification of Priority Channels/Customers & Consumer Segments
  - Channel/Customer targets
  - Distribution, Placement/Space, Promotion & Pricing objectives
- Go-to-Market Launch Plan
  - Timing and Milestones
  - Activation plans by Channel/Customer

# **Agenda**



- Opportunity
- Objective
- **Deliverables**
- Approach
- Benefits
- **Timing**



# **Brand Re-launch approach**





**Module 1** 

Brand Positioning & Equity



Module 2

Promotion & Communication Plan



Module 3

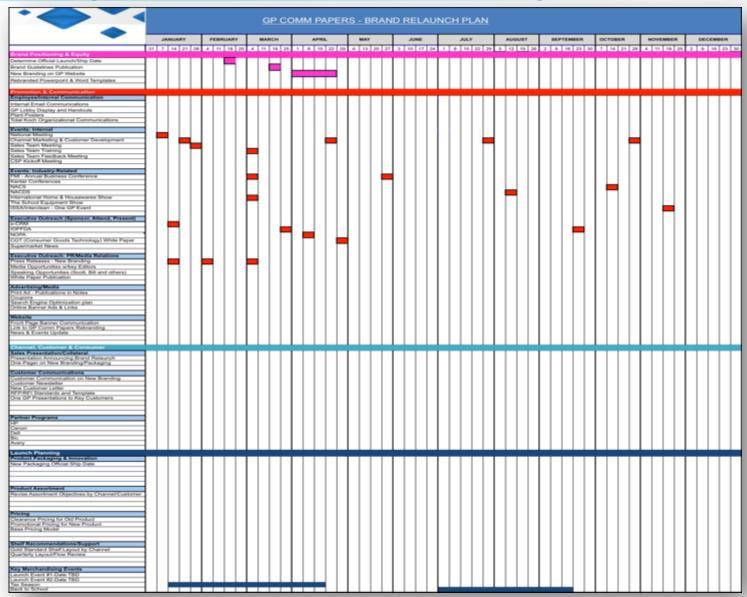
Channel/Customer & Consumer Plan



Module 4

Launch Planning & Target Setting

# **Integrated Brand Re-launch Marketing Plan**



# **Brand Re-launch**







**Module 1** 

Brand Positioning & Equity



Module 2

Promotion & Communication Plan



Module 3

Channel/Customer & Consumer Plan



Module 4

Launch Planning & Target Setting

# The GP value proposition and positioning statement



# Everything Paper. Made Simple.

Internally facing

For the busy paper user who values clarity and simplicity,

Target Market

**Competitive** Frame

Georgia-Pacific provides home and business paper solutions

**Benefit** 

That deliver ease and convenience throughout your paper routine that you value, giving you a clear choice for your needs,

Reason to Believe Because Georgia-Pacific is the paper expert providing an easy-to-choose line of papers and continually striving to anticipate your needs and deliver simplicity when and where you need it most.

#### Rationale

Time is a factor in all of the segments' lives, and this leads them to emphasize both clarity and simplicity in their purchases

GP can eventually evolve its portfolio to include products and services that are complete "solutions" to meet both home and office needs

The benefits of convenience and ease make GP the clear 'go-to' choice, which solves the tension of time in busy consumers' lives

All segments agreed that talking about a company that is "continually striving" was appealing and more believable than an "innovative" company

# The GP brand equity framework



#### **Brand Essence**

Ease & Simplicity at Every Step of the Experience

#### **Brand Personality**

Current: Reliable; Future State: Proactive, Resourceful, Inventive and Reliable

#### **Key Benefits\***

Convenience, Ease and Trust

#### **Points of Parity**

Brightness, weight, 99.99% jam-free, sheet counts, ream count and cartons

#### **Brand Assets**

Georgia-Pacific brand, Spectrum brand,
Paper Made Simple system

#### **Reasons to Believe**

Paper expert for 50 years; Easy-to-choose line of papers; Strives to anticipate needs

#### **Points of Difference**

**Current:** Customer service, focused product portfolio, focus on paper category, capability to co-mingle and co-promote

**Enhance Current State to Include:** Packaging design, simpler product/service solutions, closed-loop system

#### **Consumer Insight**

You rarely spend much time thinking about your printer paper, but when you do, you'd like the experience to be as quick and easy as possible.

#### **Consumer Context**

Consumers (users), Business-at-Home users, and Business-to-Business buyers and users

#### **Competitive Context**

Printer/Copier Paper and Office Supply Services & Solutions

## **The GP Brand**





### Customer Value Proposition

- High quality paper for every consumer need and use
- Product packaging that reflects consumers/shoppers need for better shopability
- Consumer and Shopper expertise delivering insights that enable
   Customers to make informed decisions
- Total system efficiencies across all GP lines of business One GP
   Advantage
- Continual product improvement and innovation across functions



# **Brand Re-launch**







**Module 1** 

**Brand Positioning & Equity** 





Module 2

**Promotion &** Communication Plan



Module 3

**Channel/Customer** & Consumer Plan



Module 4

**Launch Planning** & Target Setting

# Potential benefits to changes

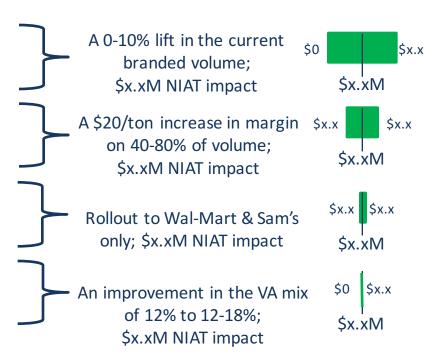


# Benefit Upside

\$x.xM

# Potential upside to increase GP branded volume....

- 1. Lift in sales
- 2. Margin improvement on branded volume
- 3. Super Premium new item business
- 4. Increase value-add product as a % of mix



**Other non-quantified benefits:** strengthened customer relationships, reinforced branding across subbrands, marketing spend efficiency, photo paper expansion, decreased number of designs to manage

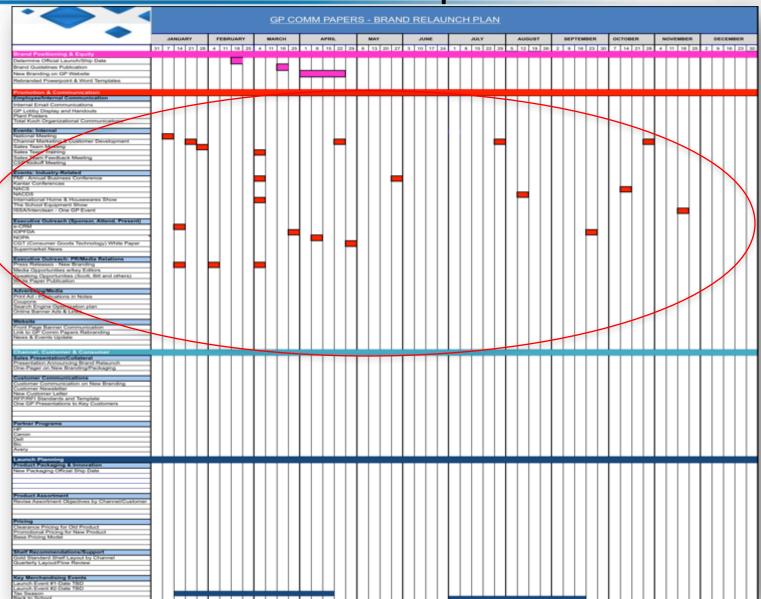
# **Brand Goals & ASMP Objectives**



- Assortment New Distribution by Channel/Customer
- Shelf Recommended Shelf Flow and Space
- Merchandising Key Promotion/Merchandising Events
- Pricing Recommended Pricing: Shelf and Promoted
- Communicate Trade Spending plan to drive incremental revenue
- Financial Goals
  - Define Financial Success metrics Revenue, Profit Margin

Account	Project	Objective	Results	Total Value
Walmart	Walmart Tissue/Towel Line Review	Deliver category insights, consumer metrics and item recommendations at 2011 line review supporting Walmart's grow market share objective. Key topics included: CSP highlights segmentation, innovation, category overview, segment drivers, GP portfolio importance, performance analysis, conversion & leakage.	Quilted Northern: Maintained distribution on QN S&S (3 items) and UP (2 items).  Angel Soft: Transitioned AS 4 Reg to 4 Dbl, Added AS 18 Dbl, Espanded distribution on AS 36 Dbl (200 stores). Overall results for AS is +1 item vs YA.  PL Tissue: Added 4 Reg (1600 stores) and 12 Dbl (1500 stores) to assortment.  Brawmy: Transitioned BR 3 Big to 3 Mega, Transitioned BR 8 Large to 6 Mega. Maintained overall distribution on BR (2 items).  Sparkle: Maintained distribution on Sparkle (4 items).  PL Towels: Added 1 Roll Deco, 1 Roll Swish & GV 6 Roll. Overall results for PL was 3 items vs YA.	\$ 61,100,000.00
Walmart	Vanity Fair Distribution Drive	Provide advanced capabilities through market/shopper insights. Link customer strategy to shopper needs. Engage in idea sharing and provide objective category recommendations. Facilitate fact driven modulars. Scorecard business performance, item and merchandising changes.	Expanded distribution on VF Dinner napkin (1000 stores) and improved shelf placement.	\$ 1,000,000.00
Walmart	Napkin Line Review	Deliver objective category overviewinsights, strategy/implications, merchandising solutions, item recommendations & innovation opportunities at category review.  Key topics included: Napkin segmentation, consumer preferences, CSP, category overview, brand/channel shifting and competitive comparison.	Vanity Fair: Added VF Hand Towel. Maintained distribution on remaining Items (3 items): Secured (VF Bonus Pack 220ct feature executed with side kick display in May 2011. Secured VF In/Out 400ct feature executed May 2011 as in/out feature. Mardi Grass: Lost half of the distribution (1500 stores). PL Napkins: Transitioned VMJ 250ct to 300ct and 500ct to 600ct (2200 stores). Added 150ct (2900 stores).	\$ 11,200,000.00
	SLCP Analysis	Show buyer how SLCPs are affecting overall category sales and make reco to keep or disc, using CSP insights to build story	Buyer decided to keep BT SLCP, will continue to review PT SLCPs	\$ 12,000,000.00

**Promotion & Communication plan** 







Promotion & Communication Plan

# **Brand Re-launch**





**Module 1** 

Brand Positioning & Equity



Module 2

Promotion & Communication Plan





Module 3

Channel/Customer & Consumer Plan



Module 4

Launch Planning & Target Setting

# Channel, customer & consumer plan





- Channel plan to prioritize Channel focus
- Identification of emerging Channels and opportunities

#### Identification of Priority Customers

- By Channel key customer sales plans
- Optimal distribution, shelf, merchandising & pricing plans

#### Identification of Priority Consumer Segments

- Identify key GP Consumer Segment targets and sales plan
- Shopper Marketing plan to align with key retailer segmentation

#### Distribution, Placement/Space, Promotion & Pricing objectives

- Sales fundamental targets by Customer
- Sales fundamental targets and plan for Sales team



# **Brand Re-launch**







**Module 1** 

Brand Positioning & Equity



Module 2

Promotion & Communication Plan



Module 3

Channel/Customer & Consumer Plan



Module 4

Launch Planning & Target Setting

# **Launch planning & target setting**





- Timing and Milestones
- Sales targets and KPIs



- Category focused sales presentation
- Shopper/Consumer focused insights and unmet needs
- Retailer driven Strategies and Tactics

#### Activation plans by Channel/Customer

- Customer planning calendar
- Scorecard and KPI tracking





# **Communication Papers Brand Re-launch**

February 13, 2013



## **Communication Papers Discussion**



### **Meeting Objective:**

• To provide *the retailer* with an overview of the Communication Papers category and develop the path forward driven by the research data and consumer / shopper insights.

#### **Desired Outcomes:**

- Raise the level of understanding of the communication papers category
- Provide and gain commitment to the Path to Purchase process
- Provide and gain commitment to the GP Brand Re-launch components
- Build a Business Opportunity platform to drive the mutual goals for the category

## **Discussion Topics**



- Industry & Category Overview
  - Economic Trends
  - Retailer Trends
  - Category Overview
- GP Commitment to Category Growth CSP
  - Understanding The Shopper
  - Channel Strategic Plan
  - Key Shopper Issues That Need Solving
- It's Simple!
- Mutual Category Goal Discussion
- Next Steps with PPRs



# **Economic Uncertainty and Retailer Macro Trends**

# Today's environment: Economic uncertainty & Household shift impact





- 1. Economic: Outlet selection & shopping behavior impacted by ability to spend
  - Same store retail sales will be compressed
- 2. Demographic: Significant shifts in makeup of households with purchase power
  - Generational shift of heavy spending HH
  - Multicultural market density & American urbanization
  - Technology integration



# Today's environment: Understanding the landscape can be difficult





 Consumers will shop multiple outlets and will further optimize trips.



 eCommerce capabilities will redefine channel marketing strategies.



 There is a new battleground for brick & mortar growth that comes in all shapes, sizes & markets.



 Declining same store sales will require optimization within the value chain.



 A changing shopper DNA will require focused strategies to win (i.e. life-stage, multi-cultural).

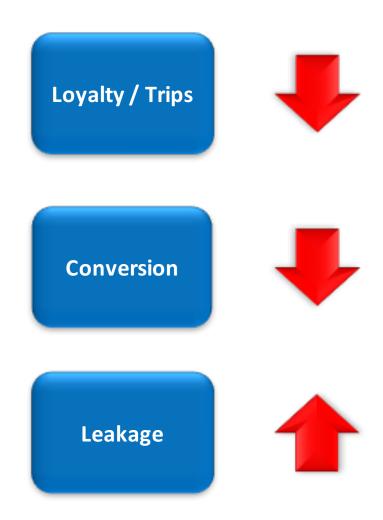


 The great recession has created a new store brand "normal".

## The situation:

# Important business issues facing retailers today





# **A Key Need Among Retailers**



# North American Retail Landscape Study (NARL) A Retailer Perspective:

"The best suppliers that call on me are those that <u>provide solutions to help me grow my category"</u>

"Our suppliers need to present <u>shopper-based solutions</u> to help grow my category and excite our shoppers"

"Don't just come to me with your stuff – <u>tell me how it supports my</u> <u>category strategies</u>; how it should be arranged on the shelf and how it impacts my overall assortment approach"

"I have a great deal of respect for suppliers that come to me with tactic recommendations that are category-based – not brand-based"

# **Path To Purchase = Continuous Cycle**

Understanding the SHOPPER around the P2P is the key to driving growth!

Category Trips Size of Trips

**Total Trips** 



Converted
Un-Converted
% Bought on Deal
Basket Size
Traffic Buying Rate

**Conversion** 

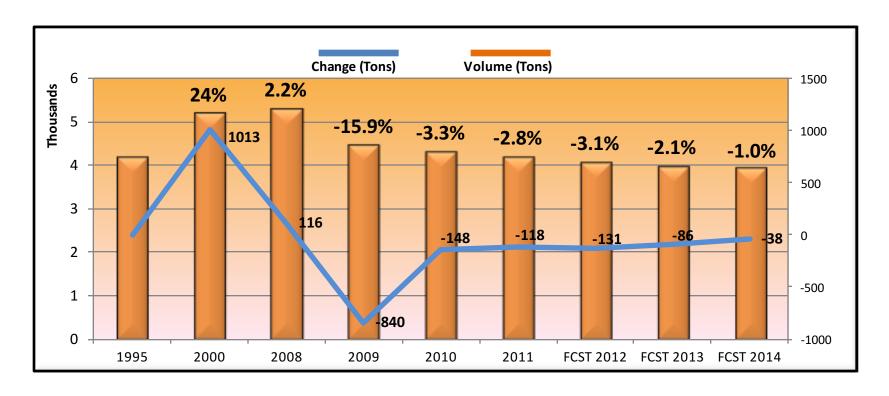


# **Category Overview**

# **Industry Update: North American Paper Shipments**



# Uncoated Paper Shipments (000 Thousand Tons) \* Includes import paper supply



- Total cut sheet paper shipments continues to shrink due to work force reduction, budget crunches, and technological substitution
- 2012 volume is forecasted to be down 3.1% or 131,000 tons



# **Commitment to Driving Growth - CSP**

# **Category Selling Platform Approach**





PHASE 1

Insight Identification



PHASE 2

Category Vision



PHASE 3

Category Definition & Role



PHASE 4

**Strategic Planning** 



PHASE 5

Initiative **Development** 



PHASE 6

Plan Launch

- Comprehensive Discovery & Category Analysis/ Assessment
- Compelling Business Question (CBQ) Development
- Insight Headline Goto-Market Document

 The Vision – Category Want or Expect the Category to

be over the

next 3 years

 Category **Importance** 

Structure

- Category Strategic **Platform** 
  - Scorecard
- Category Initiatives and **Tactical Plans**
- Go-to-Market Selling Platform Finalization
- Implementation Plan

# Research leading to a full Segmentation was completed to understand the <u>consumer</u> landscape









Jessica & Jeff the Ma

Jessica and Jeff are serious about social responsibility. They seek out companies with great reputations. With them, paper is a precious resource but they also demand



Mary the Activist

Mary is serious about the environment. She conserves and uses every piece of the paper she comes in contact with. In her eyes paper must be conserved.



Tim & Melanie the Professionals

Tim and Melanie are serious about paper. They want the best performance paper and must stock the largest variety and highest quality.



#### Jim the Retiree

Jim uses printer paper only when he needs it. He's not tembly concerned with the environment, but he is concerned about the cost of using such valuable paper.

#### **BUSINESS AT-HOME**



Valerie the Free-lancer

Valerie is concerned with her image. She wants to put her best foot forward with her growing company, thus she selects paper based on performance and social causes.



#### Jerry the

Jerry is a bottomline type of guy. He spends his days managing tight schedules and budgets. The role of paper in his life is essential but he doesn't demand much.



Dave the Micro-Corp

Dave owns a small business with great potential. He buys paper from local retail that have great qualities for paper. The environment isn't a factor in his decision.



**BUSINESS-TO-BUSINESS** 

Aimee the UCB

Aimee just wants to make it through the day. She looks for companies that sell a lot of paper and offer the easiest and cheapest way to get a lot of it to her quickly.



Karen & Jeff Active Mgrs.

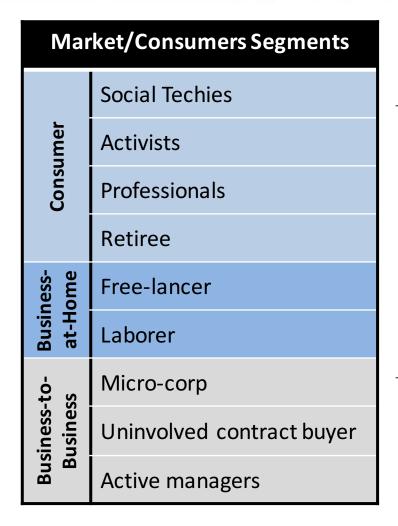
Karen and Jeff's sole responsibility is to ensure their their companies select the best quality paper and companies that represent their brand image.

## **Three Consumer Groups / 9 Sub-segments**

- Consumer
- Business at Home
- Business to Business

# **Shopper** Segments streamline the ability to reach your target shoppers through promotional and awareness programs







### **Shopper Segments – Each has unique attributes**





#### Shopper Segments - Who they are



We have identified 4 Shopper Segments for paper. These outline consumers and small businesses' 4 basic buying patterns and behavior when shopping for paper.





**1.** <u>Cost Conscious Shopper</u> - These consumers compare prices in store and buy a low-cost paper.

"I look at the specials in store, then I go to the shelf to find what's cheapest."



**2.** <u>Consistent Shopper</u> - These consumers buy the same type of paper each time they go shopping, without evaluating what else there might be in the store, even though it might be better and / or cheaper.

"I always buy the copy paper. I know what it looks like, I know it's on the bottom shelf, and it's the cheapest."



**3.** <u>Comparative Shopper</u> - These consumers reevaluate their options each time they go shopping. "I like to evaluate my options each time, look at the quality, price, and then I usually choose something in the middle."



**4.** <u>Casual Shopper</u> - These are consumers who have little interest in paper and shop quickly with little regard for the type of paper or the price.

"When I need it, I buy it, doesn't matter where"

#### **Shopper Segments – How they shop**



#### **Decision Hierarchy and Order of Influencers**

#### Cost Conscious Shopper

Convenient Location of Store

Lowest Price

Special Offers/Promotions

Paper Designed for Your Printer

Ease of Getting In/Out of Store Quickly

At Your Preferred Store to Shop



#### Comparative Shopper

Convenient Location of Store

Paper Designed for Your Printer

**Lowest Price** 

Broad Assortment of Paper to Select

Weight of Paper

**Brightness of Paper** 



#### Consistent Shopper

Convenient Location of Store

Paper Designed for Your Printer

**Lowest Price** 

Weight of Paper

**Brightness of Paper** 

Broad Assortment of Paper to Select



#### Casual Shopper

Convenient Location of Store

**Lowest Price** 

Paper Designed for Your Printer

Ease of Getting In/Out of Store Quickly

At Your Preferred Store to Shop

Broad Assortment of Paper to Select.



#### **Triggers of purchase**

Based on our discussion with consumers, there are four main triggers that initiate purchase:

#### Low / out of paper

The most common comment from consumers. This sometimes resulted in a late night trek to a grocery or drug store to buy paper in an emergency.

#### Impulse purchase while in / near store

Consumers stated that they were in or near a store and, either the store itself or a display inside triggered the purchase incident. Buying ink was often accompanied by a paper purchase.

#### Flyer / coupon made me decide to stock up

Another common push to buy was seeing an outside influence such as a flyer or coupon to instigate the thought of purchase.

#### On a regular re-order cycle for my business

Some consumers in the Business-to-Business and Business at-Home segment stated they regularly bought paper, and that cycle was the trigger.



#### **CSP – Channel Strategic Platform**



- Many shoppers do not consider Mass first for their paper needs. Shopper Quote: "It's not Wal-Mart or Target's focus".
- This is a significant opportunity for Mass. Research learning: 54% of paper shoppers fall into the 'cost conscious segment'...a consumer area that is known and typically owned by Mass.
- While school supplies can be a focus for shoppers at Mass, paper seems to be an add-on. Shopper Quote: "The first time I bought paper at Wal-Mart, I was there buying school supplies and stumbled on the paper".
- Finding the category in a Mass store is an issue. Shopper Quote: "My wife shops every aisle, so she actually found it".
- Consumers are receptive to signs and product displays in this category. Research learning: 77% of shoppers said effective signage was important to them finding the category. 22% said end-of-aisle displays were important.
- Mass merchandisers "own the traffic". Wal-Mart is now the nation's largest grocer with over \$200 billion in its 3600 supermarket stores. As a comparison, Kroger sales = \$76 billion.
- Paper is a low involvement category. Shopper Quotes: "It looks like a lot of the same thing" "I don't understand or pay much of attention to weight & brightness".
- Opportunities exist to close the deal on the existing traffic. Research learning: Paper is a necessity for most, but overwhelming choice, plus low understanding of features & benefits = frustration at the shelf

#### **Strategies**





Primary Shopper Targets: Cost Conscious Shopper; Comparative Shopper

# A Common Shopper Issue – Overwhelming Wall of Paper



In the focus groups we showed participants a picture of a paper shelf to get their un-aided initial reactions to this important component of the shopper experience. The term "Wall of paper" was used by one person and is an accurate descriptor for the feelings of most shoppers.

"They all look the same – literally. I would have to pick it up and read the side to see what's different"

"There's a lot of paper, but it looks like a lot of the same thing. There's not a big distinction between the various types of paper"



"I guess if you're a creature of habit, it's easy to buy because you just buy the same thing"

"It's over whelming.. I just see a lot"

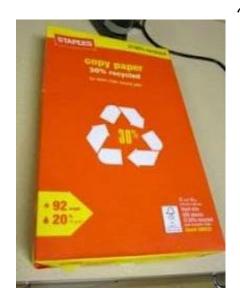
"Something's got to jump out at me when I'm shopping. The red really jumps out at me. I'd probably go for the buy 2 get one free."

### A Common Shopper Issue – Lack of Understanding of Product Uses & Benefits



No matter who the shopper is, there is little awareness or understanding of paper ratings and on-product language

- Weight is generally disregarded for print/copy paper purchased for everyday use
- Most buyers of paper understand that the weight on the pack represents the weight of the paper, but not what the number represents
- Some respondents asked decided brightness was on a scale of 100, but weren't certain



"I have zero knowledge of what that means, other than I'm assuming the brightness means that on a scale of one to a hundred, that's how white it is maybe. And 20 pounds, that doesn't look like 20 pounds of paper to me. I don't know what that means."

Elizabeth, General User,Atlanta



How will GP help our Customers change the Category Landscape?....It's SIMPLE!

**Product selection** 



#### Simplifying the shopping experience: Good, Better, Best

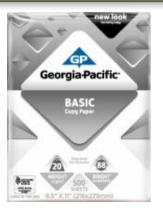
- Over 18 months of significant investments into consumer research
- Input from over 4,300 consumers, business at home, & business users
- Conducted 50+ qualitative focus groups, on-line surveys, shop-a-longs, path-to-purchase research, and brand platform studies
- Conducted 24 months of product, packaging & storage solution innovation research



New packaging design



## Simplifying the design & message



Georgia-Pacific

STANDARD RECYCLED 30%



Georgia-Pacific

PREMIUM
Ink Just & Laser
Pager

Soo SHETS

SOO SH

Premium 22-24LB





**Super Premium 28LB+** 



New packaging design



## Simplifying the design & message





Premium Matte Photo Paper



Premium Gloss
Photo Paper

Georgia-Pacific



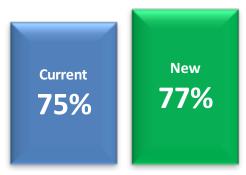
Specialty Cardstock



New packaging design



### Consumers prefer the new design across key measures



#### **Purchase Intent**

Please consider the product you just saw and indicate how likely you would be to buy it.

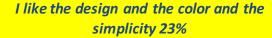
Percentage indicates top 2 box; Definitely or probably buy



#### **Emotional Response**

Which of these faces best expresses how you feel about this product?

Percentage indicates positive emotional response; Happiness or surprise



I like the design and the color 14%

The packaging stands out more than any of the others 20%

Very colorful, informative, and modern 17%



#### **Most Appealing**

Now, please select which <u>one</u> of these sets of package designs you find most appealing.

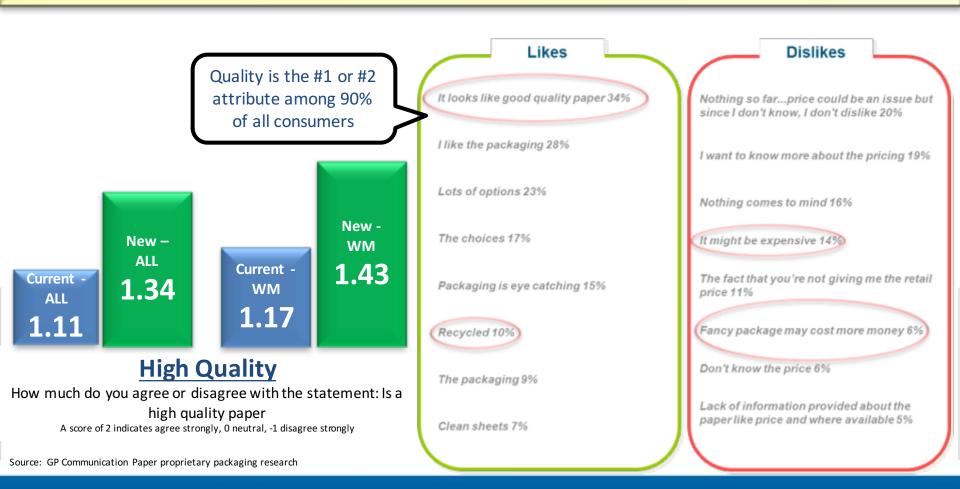
Percentage who selected design as most appealing Note: a third design was presented in the testing

Source: GP Communication Paper proprietary packaging research

New packaging design



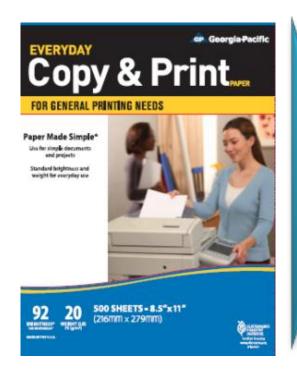
### New design dislikes are only related to price being unknown

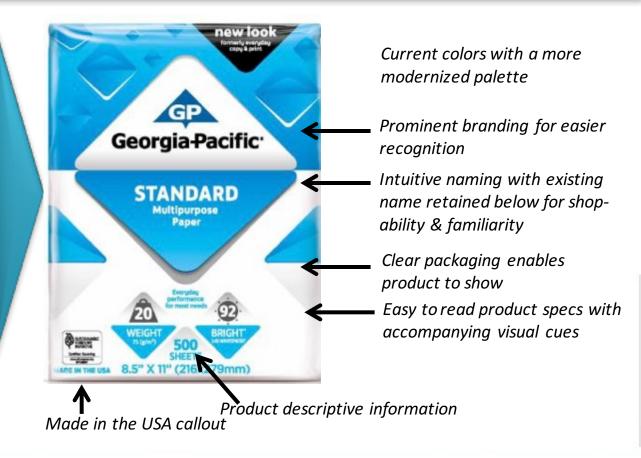


New packaging design



### Close-up on the enhancements





New packaging design



### Close-up on the enhancements



### **Georgia-Pacific is Committed To Paper Categories**

- Vertically integrated paper manufacturing facilities
- Mill direct supply chain solutions
- Committed to driving innovation and re-defining copy paper category
- Prominent copy paper branded placement nationwide across Grocery, Drug, Club, Mass outlets
- Consumer products manufacturer of a vast amount of paper products







#### **Georgia-Pacific Communication Papers**

#### **Our Product Portfolio:**

School, Home & Office Papers

Georgia-Pacific holds a strong retail and businessto-business presence through an offering of Georgia-Pacific branded paper products.



# Long-term U.S. paper manufacturer with both East and West Coast operations



Printer paper that performs across a wide variety of home and office printing applications:

- Multipurpose Paper
- Ink Jet & Laser Paper
- Cardstock
- Photo Paper



Support in 2013 and beyond

**Increased marketing support** 



## Supporting the new positioning at launch & beyond

Website



Print ad with offer



Pallet displays



Shelf Signage





Awareness drives Consideration / Trial which drives Conversion!







**Increased marketing support** 



### Communication look & feel currently under development

...to support the full line...





**Packaging & merchandising innovation** 



### Driving simplicity through innovation



# Optimized Pallet design for aisle and seasonal displays

- Store labor reduction
- Optimal for non-Super Center stores
- GP to introduce in 2013



# Enhanced carton design for displays and carton sales



- Tear away design
- Optional to use allows maximum flexibility
- GP to introduce in 2013
- Provides easier access to bottom two reams versus current display carton design
- Provides a "cleaner" look on shelf and endcaps

#### **Georgia-Pacific's 4 Promotional Pillars**





Awareness

Conversion

Basket Building

Trips

Georgia-Pacific has identified products that we will utilize at these specific times of the year which will drive 4 major retailer strategies for your stores.



### **Georgia-Pacific's Integrated Promotional Plan**



FY 2014	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Trade Support	FSI			FSI			FSI	FSI				FSI
Brand Awareness Support			GP 10pk	GP 5pk								
FSI (GP)												
Coupons.com Support	Streamline this down to execution windows around "lull" seasons, include skus supported in each campaign											
Digital	Include information on potential digital campaigns. Could use more than one bar to represent each campaign type and timing.											
Innovation				Inclu	de informat	tion about in	nnovation lau	nch and test	timing			
Shopper Marketing	Include information on potential programming along with affinity partners											
Coupon Booklet												
Direct Mail	T	argete	ed Cate	gory/	GP Aw	arene	ss prog	ram wi	th affi	nity ca	itegor	ies

# **Georgia-Pacific is Dedicated to Investing in Driving Awareness in Copy Paper Category:**

Tax Time FSI January 15, 2012



PRE-BTS FSI June 24, 2012



Need generic pictures

BTS/BTC FSI Sept. 9, 2012







BTS TAB August 12, 2012

> TAB '2<sup>nd</sup> Semester' December 30, 2012



# It is important to drive the message to Consumers & Businesses across outlets:



Walmart.com October 8, 2012















# Shopping online for paper represents growth especially among consumers



Market	Segment	% of EQ Vol	% of PPL Shop Retail	% of PPL Shop Online	
Consumer	Social Techies	3%	97%	42%	
Consumer	Activist	3%	99%	4%	
Consumer	Professionals	8%	92%	30%	
Consumer	Retiree	4%	98%	4%	
Business at home	Freelancers	3%	79%	44%	
Business at home	Laborers	4%	95%	15%	
Business	Micro-Corp	17%	73%	36%	
Business	Uninvolved Contract Buyer	35%	33%	80%	
Business	Active Manager	23%	57%	86%	

#### **2013 Copy Paper Planogram:**



INSERT IMAGE FROM 33<sup>RD</sup> FLOOR PLANOGRAM SET UP – BEING BUILT ON TUESDAY 2/4 WITH IMAGES AND PICTURE BEING TAKEN BY JARED'S IPHONE







### **Conclusions / Next Steps:**



### **Aligned Opportunities:**

FY 2014 Aligned Opportunities	Next Steps
• 1	• a • b
• 2	
• 3	• a
• 4	• a
• 5	• a
<ul><li>Promotion Opportunity 1</li><li>Promotion Opportunity 2</li></ul>	• a • b
Supply Chain opportunities	• a

### **GP Communication Papers Scorecard**



- Track results and success
  - Revenue / profit
  - Speed-to-market with Innovation/New Products
  - Quality vs. competition

### **Agenda**



- Opportunity
- Objective
- Deliverables
- Approach
- Benefits
- Timing
- Next Steps



#### **The Benefits & Outcomes**



- Delivers an efficient and effective platform to re-launch the GP Communication Papers portfolio
- Creates organizational focus and positive energy around an important marketing and sales initiative
- Mechanism for creating strategic alignment & thought leadership with key customers and distributors
- A process to drive results via clear objectives and sales fundamentals

### **Agenda**



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#### **Timing**





Module 1

Brand Positioning & Equity



Module 2

Promotion & Communication Plan



Module 3

Channel/Customer & Consumer Plan



Module 4

Launch Planning & Target Setting

November/December

January

**February** 

### **Agenda**



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#### **Activation Plan & Timing**



#### Step 1 - Do Now

This is immediate execution and represents near term wins.

#### Step 2 – Do Next

This is work that will take longer to develop and execute. This work should still be in the current or next year's AOP.

#### Step 3 – Do Later

This is work represents capital investment and/or changes in store layout, policy or strategic direction.

3-6 months

12 months

12+ months

#### **Next steps**



- Launch the plan
  - Consumer
  - Channels
  - Customers
  - Company

