



**2012 INg Forum Agenda**  
**Hotel Del Coronado**  
**March 14-17, 2012**

<b>Tuesday March 13<sup>th</sup></b>	<i>Trustees Only for Afternoon Board Meeting</i> <i>Continental Room – 3:00pm</i>
3:00pm – 6:00pm	ING Board of Trustees
<b>Wednesday March 14</b>	Meetings – <i>Continental Room</i>
	<i>Members Companies only till Lunch</i> <i>Members and Partners lunch and afternoon sessions</i>
7:30am – 8:30am	Breakfast – <i>Crystal Room</i>
8:30am – 8:40am	Welcome, Harry Stephens. INg President
8:40am – 9:50am	<b><i>Member Introductions and Member Open Forum</i></b> <b><i>“How is Your Company Battling the Recession and What is Concerning You for 2012 ”</i></b> Moderator: Stu Masson, RCS Printing
9:50am – 10:00am	<b><i>ING Financial Review</i></b> , Tim Johnson, SCICOM, INg Treasurer
10:00am – 10:15am	Break – <i>Crystal Room</i>
10:15am – 11:15am	<b><i>“What is Hot and New for 2012”</i></b> Noel Ward, Managing Director, Brimstone Hill Associates
11:15am – 11:45am	<b><i>Members Q+A with the INg Board of Trustees</i></b> <b><i>Overview of Member Survey</i></b> Moderator: JP Thomas, CEO, Allison Payment Systems
<b>&gt;&gt;&gt;&gt;&gt;&gt;&gt;Partners Welcome for Lunch and Afternoon Sessions&lt;&lt;&lt;&lt;&lt;&lt;&lt;</b>	
11:45am – 1:00pm	Lunch – <i>Garden Room</i> <b>Peer2Peer Round Table Discussion</b>
1:00pm – 1:30pm	<b>Riso</b> <b>Steve Kaufmann, Business Development Manager</b>
1:30pm – 2:00pm	<b><i>How do drive new revenues &amp; services through print and mail with Hybrid Mail</i></b> <b>Didier Rouillard, GMC Software</b>

2:00pm – 2:15pm

Break – *Crystal Room*

2:15pm – 3:00pm

***Mail Optimization Panel***

*By March 2012 there will be many changes from the USPS  
Come hear from some of our members and  
partners on ways to increase your mail options to your  
customers*

Panelist: Brian Wilson, Pitney Bowes  
Corey Smith, Satori Software  
George Vaisey, Bell and Howell  
Moderator: Harry Stephens, CEO, DATAMATX

3:00pm – 4:30pm

***Keynote Speaker: Peter Leyden***

***Noted expert on Megatrends and Technology Trends***

***“Our Age of Transformation: Major Trends in the 21<sup>st</sup>  
Century”***

Leyden deeply understands the technology and new media, having served as managing editor of the original Wired magazine that introduced the digital revolution to the world and that pioneered the early online world of the web. Out of that experience, he will come speak to our group about Major Trends in the 21<sup>st</sup> Century

6:00 – 9:00pm

***Welcome Reception  
Windsor Complex***

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



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<b>Thursday March 15th</b>	<i>Members and Partners for meetings, All attendees and guests Continental Room</i>
7:30am – 8:30am	Breakfast – <i>Crystal Room</i>
8:30am – 9:00am	Welcome and Introduction of Partners, Harry Stephens
9:00am – 10:00am	<b><i>“Are You Up on All the Acronyms: SSAE16, PHI, HITECH, PAN, NIST, GLBA, PCI DSS, FISMA” Data Security Compliance and Regulation Nancy Kaplan, CISA, CRISC, CliftonLarsonAllen LLC</i></b>
10:00am – 10:15am	Break– <i>Crystal Room</i>
10:15am – 10:30am	<b><i>New Member Introduction – American Marketing Dan Van Erden, Executive Vice President</i></b>
10:30am – 11:00am	<b><i>Digital Mailbox Volly Paul Rokos, Pitney Bowes</i></b>
11:00am – 11:30am	<b><i>Get Personal. Get Results. Perfecting the Personalized Campaign from Data to Reality Shelley Sweeney, VP/GM Service Bureau/Direct Marketing Xerox</i></b>
11:30am – 12:30pm	<b><i>Ned Lenhart, MBA, CPA Interstate Tax Strategies</i></b> There are a multitude of sales tax issues facing your industry and a wide range of issues facing multistate businesses in general. There is renewed interest in this area before Congress now and a many states are becoming more aggressive at finding ways to capture lost revenue from out-of-state companies who are doing business in their state
12:30pm – 1:30pm	Lunch - <i>Garden Room</i> <b><i>Peer2Peer Round Table Discussion</i></b>
1:30pm – 2:00pm	<b><i>InfoPrint Suzanne Oles</i></b>

2:00pm – 2:30pm	<b><i>Plugging In Scaling, Security &amp; Compliance to Your ADF Strategy</i></b> <b>Mary Ann Rowan, CMO &amp; V.P of Sales, Solimar</b>
2:30pm – 3:15pm	<b><i>A Structured approach to Innovation, utilizing "Blue Ocean Strategy"</i></b> <b>Vrij Harry, CEO, Harry's Printers</b>
3:15pm – 3:45pm	Break <i>Crystal Room</i>
3:45pm – 4:45pm	<b><i>"Opportunities for Color Digital Printing in the Production Digital Printing Market"</i></b> <b>Dave Erlandson</b> <b>General Manager Caslon, PODi</b>

This talk will take a look at the market opportunities in the production printing market that are enabled by digital printing. Dave will provide summary results from extensive research and provide insight into the leading applications and opportunities.

Growth of digital color printing is tied to simple economics; color digital printing has to create new value (and justify a higher print cost) or decrease costs of existing applications. So how does digital color printing create new value? Dave will provide case studies and analysis of the following ways digital printing is used to create value

6:30pm – 10:00pm	<b><i>Flagship Monte Carlo Dinner Cruise on the San Diego Bay</i></b>
6:30pm	Boarding Time on Doc 1
7:00pm	Debarkation
7:00pm – 8:00pm	Hors D'oeuvres
8:00pm – 9:00pm	Dinner

We will be on the luxury motor yacht, The California Princess.  
On Board Casino featuring: 2 Black Jack Tables, 1 Roulette a 1 Craps Table





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**Friday March 16** *Members and Partners for meetings, All attendees and guests  
Continental Room*

7:30am – 8:30am Breakfast – Crystal Room

8:30am – 9:00am **Guy Broadhurst  
Oce**

9:00am – 9:30am **Mike Maselli  
Bell and Howell**

9:30am – 9:45am *New Member Introduction of LetterLogic*  
Sherry Duetschmann, CEO and President

9:45am – 10:00am Break – Crystal Room

10:00am – 11:00am ***Driving Electronic Billing and Payment Process  
Improvements for Your Clients,***  
**Rob Unger, Senior Director, NACHA**  
**Chris Huppert, Senior V.P., Wells Fargo**

Considering current and prospective USPS changes, along with the continued migration of consumers and businesses to electronic processes, offering your clients a full array of print, mail, as well as electronic billing and payment services is a strategic opportunity. However, the simplicity of the Electronic Bill Presentment and Payment (EBPP) concept is at times challenged by the service integration difficulties providers can face in the effort to provide a seamless and positive client experience. In this session, Rob Unger, Senior Director at NACHA-the Electronic Payments Association, will present data from recent NACHA research that identifies electronic bill presentment and payment pain points, and will discuss approaches to improving these processes for your clients

11:00am – 11:30am ***A Revolutionary New Product: M-Disc***  
**Mike Johnson, Doculynx CTO**

11:30am – 12:30pm ***“E-Payments – Closing the Loop”***  
Panelist: Pat Maurer, President, Apex Print Technologies  
Marianne Gaige, CEO, Cathedral Corporation  
Kevin Thomas, Allison Payment Systems  
Moderator: Rob Unger, Senior Director, NACHA

12:30pm – 1:00pm ***INg Membership Open Forum***  
*Come prepared to discuss ideas to improve our Association.  
Announcement of 2013 Forum Location and 2012 Workshop*

1:00pm – 2:00pm Lunch – Garden Room

***Afternoon and Evening on your own!***



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<b>Saturday March 17th</b>	<i>Members and Partners for meetings, All attendees and guests</i>
7:30am – 8:30am	Breakfast – <i>Crystal Room</i>
8:30am – 9:00am	<b><i>Introduction to Uluro</i></b> <b>Adam Armstrong</b>
9:00am – 9:30am	<b><i>Getting to know Satori Software</i></b> <b>Corey Smith, V.P. Production Mail Solutions</b>
9:30am – 10:00am	Break
10:00am – 12:00am	<b><i>M+A Strategies – Three Perspectives</i></b> Moderator: Marianne Gaige, CEO, Cathedral Corporation Panelist: Dave Henkel, CEO, Johnson & Quin Scott Bernstein, CEO, OSG Billing Services Harry Stephens, CEO, DATAMATX
12:00pm – 1:00pm	<b>In Depth Discussion – 3 Topics</b> Rising Supply Costs Tablet and Mobile Devices Outsourcing “Development” Moderator: Dan Adler
1:00pm – 2:00pm	Lunch <b><i>Peer2Peer Round Table Discussion</i></b>
6:00pm – 7:00pm	<b>Reception – Garden Terrace</b>
7:00pm – 9:00pm	<b>Awards Dinner at the Garden Terrace</b> <i>All Attendees and Guests</i>