FACING THE FUTURE
THE PRINTERS' GUIDE TO STRATEGY

BY PETER JAMES

BPIF

FACING THE FUTURE
THE PRINTERS' GUIDE TO STRATEGY

FACING THE FUTURE
THE PRINTERS' GUIDE TO STRATEGY

When we look at today's successful printing and packaging companies we find that, almost without exception, they are driven by an in-depth understanding of the changing needs of their customers and markets. They have developed a team of people with the skills and motivation to enable them to excel at meeting those needs, and they seek to continuously optimise their utilisation of systems, people and equipment. They also focus all their resources on a few simple objectives, such as providing solutions rather than simply selling products, and continually improving their performance. Facing the Future is one the first outcomes of the DTI-funded *Print 21* initiative to improve the industry's competitiveness that the BPIF has been leading over the past year. It draws on the real-life experiences of print companies that have adopted a strategic approach to managing their companies and have reaped the benefits of so doing. This guide also draws on previous BPIF initiatives to help printers become more strategic and I am sure that it will help every printer to face the future with renewed confidence.

Michael Johnson, Chief Executive, British Printing Industries Federation

We are all seeking a healthy and prosperous printing industry. That requires a professional approach to management and the adoption of best practice by the industry at large. Without this many companies will not survive the fierce competition created by the productive capacity of current technology growing at a faster rate than the demand for print.

This user-friendly guide provides practical examples of printing firms that have achieved these goals by making them part of their strategy. It offers an invaluable helping-hand for all, but especially the many small businesses in the industry. Good strategy is good practice. It can make the difference.

Jim Raeburn, Director, Scottish Print Employers Federation

When we evaluate investment proposals we don't just assess the numbers, but also their strategic rationale, and the quality of thinking of the management team which is putting them forward. The best investments will be contributing to the company's overall development – for example, by increasing flexibility or opening up new products or sales opportunities – rather than just cutting costs or increasing capacity. I'm sure that this Guide will help companies of all sizes to better understand some of these strategic issues and support the long-term interest which we all share – which is a financially healthy print sector.

Martin McEachran, Head of Sales at HSBC Equipment Finance

Before entering printing, much of my career was spent formulating and implementing strategy in manufacturing and retailing, both as a management consultant and as a CEO. Strategy is universal, so it's been straightforward to apply my experience at Direct Image and avoid the problems I have seen in many small printers. They often pay more attention to the latest kit or the overtime figures than big strategic issues.

There are many opportunities to grow and diversify in collaboration with customers, to radically cut costs through lean production techniques, and to drive continuous improvement through benchmarking. Strategy is also academic if the boss hasn't got his head round how to delegate responsibility for, and foster involvement in, its implementation. This Guide will help printers to avoid these mistakes and to develop a more strategic approach to their business.

John Pulford, Chief Executive, Direct Image

I began my career as a salesman and gradually learnt how successful selling is underpinned by a marketing strategy. When I acquired my first company I saw that marketing is just one part of business strategy. Attending a short course gave me the chance to stand back and set some strategic goals, such as making acquisitions to reach a critical mass of turnover (which we've achieved) and formulating a long-term exit strategy (which I'm still working on!). My strategic lessons have been learnt the hard way but now there is a short cut for small print companies. Read - and act on - the Guide and I'm sure you'll make better strategic decisions.

Ray Tindle, Managing Director, Chameleon Press

INTRODUCTION

The report *Print 21: Coming of Age?* analysed the current situation and future prospects for print, and created an action plan for change. One of its recommendations was more help for printers in developing and implementing successful business strategies. This Guide is the result. It has been produced by the BPIF, in collaboration with its *Print 21* partners.

The Guide distils, and provides many examples of, the experiences of printing firms that have achieved real business benefits from a strategic approach. It has three main parts:

· Sections 1-5, which explain what strategy means within the printing industry
· Case studies of two printers who successfully used the BPIF's strategic audit tool, *Into the Digital Age*, to drive strategic change in their companies
· An appendix which contains the audit questions from *Into the Digital Age*, reproduced by kind permission of the BPIF.

A web site, www.printmanager.org.uk/strategy, also provides more information and useful links on the topics discussed.

CONTENTS

The company examples presented in following pages, are presented simply as useful illustrations of the points being made within the Guide, rather than models which should necessarily be followed in all instances.

Go to www.printmanager.org.uk/strategy for more information on many of the topics discussed in this Guide.

1. WHAT IS STRATEGY?

Strategia – as it was then called – began with the ancient Greeks. It described the art of commanding armies. Subsequent military theorists refined the distinctions between:

- **Strategy** – the overall direction of military forces, especially in war
- **Operations** – the activities that need to be planned and implemented to put strategy into practice
- **Tactics** – the choice of how and where to fight individual battles.

The equivalent distinction for a printer is:

- **Strategy** – setting a direction and objectives for the business, based on an understanding of the markets and customers it is targeting, and the resources which will be needed to accomplish them
- **Operations** – the marketing, personnel and other activities that need to be planned and implemented to put strategy into practice
- **Tactics** – the day to day decisions involved in running the business, such as production planning.

Strategy is therefore the equivalent of navigation at sea – it allows you to steer a course to a destination and avoid hazards on the way. Every company will do this differently. Some will want very detailed charts and planning, based on as much data as possible about their performance, market trends, competitors and other key factors. Others will fear 'paralysis by analysis' and prefer to steer by their instincts and gut feel. All will need to be clear as to their chosen destination, and will have to take into account changing conditions – sometimes necessitating a change of speed or course. Nonetheless every strategy will involve answering four basic questions that provide the structure for this guide:

- Where do we want to be?
- Where are we now?
- What have we got to do to get there?
- What's the process of making this happen?

In practice, these aims are often inter-connected. For example, you may want to change the direction or goals of the company but the feasibility of this will be influenced by where you are now. Nevertheless, working through the questions in sequence can be useful.

Every company is different so answering the first question – where do we want to be? – has to be done by you and your colleagues. However, the process described in the remainder of this Guide should help you to clarify your objectives, and therefore give you a clearer idea of where you are going, and how likely you are to get there.

<div style="border:1px solid orange; padding:10px;">

A Financier's View of Strategy

Paul Holohan, MD of Richmond Capital, deals with around 100 finance-seeking printers a year. He sees their business plans as "just the entry point to a discussion about their strategic thinking. We want to know if the company has a convincing account of where it wants to get to and why it will succeed against its competitors. We also assess its quality of management. Are there clear functional responsibilities with people who've got the skills and aptitude for their positions? And are they interested in other areas of the business so that there's an integrated approach to strategy? We don't like insularity either inside or outside the business. We prefer evidence that people can work with and learn from others, for example, through collaboration with other businesses, because that's the only way to stay ahead in the longer term."

</div>

"Good strategy depends upon good managers"

2. WHERE ARE WE NOW?

Strategy requires a clear and brutally honest view of your circumstances so that you can make decisions based on reality rather than wishful thinking. An important part of this is examining your own thoughts and instincts – are they still valid in the world of twenty-first century printing?

Fortunately there are three time-tested ways of achieving this clarity of thought:

· Have a dialogue with the people who can influence your business success
· Benchmark yourself against other organisations, both within and outside the printing industry
· Use some of the simple strategy tools that have been developed by business schools and consultancies.

Encourage dialogue

Everybody sees things differently. Experience shows that even a management team will often have unexpressed differences of view that don't come out in routine meetings. Providing an opportunity for different views about your company and its future to be expressed – particularly by customers, managers and other staff internally, and others who have the power to influence your business success - can be invaluable. It allows everyone to learn. And it can reveal unexpected threats or opportunities – and provide the chance to avoid, or exploit, them more quickly than through 'business as usual'.

Benchmark

This can be achieved by:

· Comparing your financial performance with the ratios produced by the BPIF and SPEF for printing, or organisations such as Dun & Bradstreet and the Centre for Interfirm Comparisons for all industries.
· Making use of benchmarking templates such as the Small Business Service's Benchmarking Index[1] or the European Quality Award. These allow companies to score their performance on a range of parameters such as leadership, customer satisfaction and business results, and then compare the results with averages.
· Making your own arrangements with another business (and not necessarily one in the same product area as your own) to compare processes and operations in close detail.
· More informally, by taking advantage of network meetings and company visits organised by bodies such as Young Managing Printers, BPIF District Associations, BPIF Special Interest Groups, and local business organisations.

[1] A printing sector-specific benchmarking template is currently being developed by the Print Industry Forum and will be available in summer 2003.

Use Strategy Tools

The Guide website (www.printmanager.org.uk/strategy) provides more details of these, including an example of what is perhaps the most widely used tool – a SWOT Analysis which condenses analysis into short lists of current strengths and weaknesses, and future opportunities and threats.

Pollard Print Management

Pollard MD Mervyn Ely has used benchmarking "to make people more aware of the way the print industry was changing and our need to keep pace with it. I was very impressed by some Xerox research which forecast that 80% of print jobs would be turned around in five days by 2005, and that a majority would be done within two days. So we've now set a strategic goal of 48 hour turnaround for all our forms printing by 2005. We implement this through annual performance targets for each department. As a result we've halved our order cycle time, and are planning to take out at least a further day every year."

"We've also used PROSPER – performance auditing software offered by our local business support organisation. This compares how we're doing on important measures, such as return on capital and sales and profit per employee with both national and sectoral averages – including printing. Doing the exercise made it clear that we weren't sweating our assets enough. We've now divided our business into two divisions, one focusing on digital printing and the other conventional print. Each has their director and own sales team, and is responsible for meeting financial and performance targets. It's early days but the change is already benefiting our bottom line."

"Are your return on capital and sales and profit per employee good enough?"

3. WHAT HAVE WE GOT TO DO?

Devising and implementing a strategy in the printing industry involves answering, and integrating the answers to, four questions:

- What do current and future customers want and how can we best provide it?
- How can we get the best performance from our people?
- What systems are needed to make best use of resources and to satisfy customers?
- How can we best utilise equipment and technology to meet customer needs?

These are summarised as 'The Print Arrow'. The next sections discuss each of its elements in more detail. The appendix also contains a number of statements which allow you to audit how well you are doing on each of them.

TECHNOLOGY
PEOPLE
STRATEGY
SYSTEMS
CUSTOMERS

Secrets of Excellent Companies

A recent study of ordinary manufacturing companies which transformed themselves into excellent ones found that they emphasized:

- Better customer focus - the prompt for innovation
- Being fast, nimble and agile
- Adoption of lean production techniques
- Investment targeted towards flexibility and customer focus, rather than productivity[2].

---

[2] The Manufacturing Foundation, *Successful Transition*, London, 2002.

CUSTOMERS
AND MARKETS

Selling is focused on selling current products to anyone who will buy them over the short-term. Marketing includes this but is also about:

- The products and services you offer (both existing and new possibilities)
- Keeping your customers satisfied so that they make repeat orders
- Anticipating and meeting the changing needs of your current customers
- Winning new customers
- Doing all this and making a good profit (which means building high margin business and dealing with low margins).

Understanding customers

The starting point is understanding the broad profitability and potential of your current customers and what you do for them. Then you concentrate your efforts on growing the customers and products which are attractive, and addressing those which are only creating very low margins. When Buckingham Colour Group did this, they turned loss-making into profitable work (see case).

Achieving a good understanding of customer's business needs requires an appreciation not only of where they are now, but also of where they might be heading in future as a result of market forces, demands from their own customers and other pressures.

Identifying and attacking target markets

The textbooks discuss the implementation of marketing strategy in terms of 4 P's:

- What PRODUCTS should be sold?
- At what PRICE?
- How should they be PROMOTED?
- How should they be PLACED (distributed)?

Many experts in print marketing would also add two other P's – PEOPLE and PARTNERSHIP.

Products

Remember that customers aren't interested in products *per se* but rather in how they will help them meet their needs. If you can find a solution to their problems, then they are less likely to quibble about price. Identify and sell the business benefit your product will give them. Examples include lower total costs, better sales, enhanced brand awareness and reputation, increased staff satisfaction, faster processes and reduced hassle. And remember that the actual cost of printed material is typically only 10-15% of a customer's total cost of originating, producing and distributing the material. So there is plenty of added value which you could capture.

"Identify and sell the benefits to the customer from your work"

"Think of
the Ps of
marketing
strategy –
product,
price,
promotion,
place,
people and
partnership"

Pricing

Cutting prices so that margins become minimal is unsustainable in the medium-term. Identifying and highlighting the benefits for the customer is one way of staving off pressure. Another is unbundling the package you're providing and charging for things which might previously have been provided without charge. As Buckingham Colour Group has found, there can be scope to charge more for additional work resulting from customer errors (see case). At the very least, work provided to customers without charge should be clearly identified and flagged to them if the purpose of doing so is to build customer loyalty.

Place

Consider issues such as location of premises, the way you reach customers (is on-line ordering an option?), logistics and customer service.

Promotion

Are you taking all possible opportunities to reach current or potential customers? Abbey Press (see case) and Cantate demonstrate two unusual approaches which have paid dividends. Remember too that every promotional message should focus on customers and how you can add value for them. Maximise testimonials. Minimise information about kit.

People

These are the key to all areas of strategy (see next section), including marketing. Almost everyone working in the printing industry has the ability to influence customer perceptions and attitudes – and to gather information about them which can inform marketing strategy.

Developing Partnerships

Providing complete solutions to customer needs will often require a package of skills or activities. The only way for many smaller businesses to do this is to work closely with other companies to provide different components. This 'partnership thinking' can also help to make the most of both suppliers – who can offer valuable advice – and staff. Making it work requires a transition from an 'If you win I lose' approach to relationships to one of 'How can we both win from this situation?'.

Building Niches at Cantate

When Francis Davis, now MD of Cantate Communications, joined the company as a salesman his brief was developing new markets outside its traditional niche of printing for London theatres. He quickly identified the potential of charities because of their fast growth as a result of Government outsourcing, and their similar culture to arts organisations.

His marketing strategy, he observes, "sold not just print but a complete communications solution, based on our understanding of the special features – and limited resources - of not-for-profit organisations. We focused our promotion on charity CEOs, researching their needs through the specialist magazines they read and the events they attended. I then sent them all a personalised letter geared to their sector and organisational concerns and needs."

"We had a limited budget so we decided to go for an insert campaign. This won £150,000 of extra business from only £6,000 of outlay. Having built the niche we're now protecting and growing it. We've established a dedicated customer service executive. We're also planning to raise our profile by sponsoring a high profile Public Service lecture at the Royal Society of Arts, which will be accompanied another insert campaign. Over the next few years we want every charity CEO to recognise the Cantate brand."

"Niche marketing means thinking like a customer"

TECHNOLOGY

PEOPLE
STRATEGY
SYSTEMS

CUSTOMERS

PEOPLE

"Successful strategy requires engaging the workforce and empowering managers and teams"

With small printers, strategy has to be moulded to existing staff in the short-medium term - but it will often require new kinds of employee in the medium-long term. Ideally, this will be achieved through the maximum development of existing staff through giving them responsibility, coaching and feedback, and training. Following the principles of – and ideally seeking accreditation to - Investors in People can help with this.

However, when change is radical and/or urgent the old maxim 'If you can't change the people, change the people' becomes relevant. It may be necessary to bring in outsiders to undertake particular tasks, strengthen the skill base or simply to see the world in a different way than traditionalists.

Good strategy also requires an effective management team. They must translate lofty aspirations into concrete actions within their areas of responsibility. And, by doing so, free up the MD's time to think about strategy. Achieving this requires:

- Delegation of responsibility to, and clear demarcations between, each team member
- Involvement in strategic discussions so that each member has an understanding of the whole business
- Regular 1:1 feedback and coaching from their MD so that managers are maximising their contribution and potential.

Involving everyone in decision-making can also pay dividends. But this doesn't mean always having to handle people with kid gloves. Being part of a team means that all employees must have – and accept – clear performance expectations for which they are accountable. They also have to be empowered to achieve them, and motivated to do so.

Reward systems too may need to be changed to encourage the actions needed to achieve your strategic objectives. The general trend is towards a greater performance-related element in pay, although establishing a clear link between performance and reward has to be done carefully. Another strategic objective is likely to be greater flexibility, which will often translate into an increased need for multi-skilling.

The Investors in People Standard

IIP (www.iipuk.co.uk) is a national best practice standard for training, development and other personnel practices. To achieve it, organisations must demonstrate a practical commitment to personal development and training for their staff. Research among 2,000 IIP accredited organisations found that:

- · 80% have increased customer satisfaction
- · 70% have improved their competitive edge and productivity.

Friary Press Invests in People

Dorset magazine printer Friary Press was one of the first in the sector to be accredited to IIP, in 1995. Friary's MD, Charles Anderson, believes that IIP "has given us a lot of benefits. When I thought about our training and development objectives, I realised that we needed to draw them from a clear business strategy. As we didn't have a business plan at that time we drew one up. This proved very useful and we now update it every six months. When you're an owner-manager like me, it's easy to keep things in your head. Producing plans has required more sharing and discussion of information with my management team, which has been good for both of us. IIP has also required us to be much clearer about management responsibilities, and to better prepare supervisory staff for management by consulting and involving them. We're also prepared to let people aim higher than their current job when they're thinking about training so that we grow our skill base."

"The downside of IIP is that it does speak a language of its own, which you have to master. But as there are always more urgent things to do than plan, it can be a good discipline. After all, now everyone's got the same kit the thing that most differentiates us from competitors is our staff. Quite apart from its tangible benefits, the very fact that IIP shows we're prepared to invest in people gives an important signal. It shows that we value them, which increases their flexibility and motivation."

"Investors in People can provide a useful discipline for developing both people and strategy"

EQUIPMENT AND TECHNOLOGY

"Lean manufacturing is about identifying and eliminating all wastage within your activities and the entire supply chain"

Many financial experts say that the average printer spends too much time longing for the latest kit. And too little on considering the strategic implications of decisions (or non-decisions) about hardware and software, particularly:

- How it will help the company's market position, both now and in the future
- The kind of company it will create – for example, will it support the development of new products and skills?
- How it relates to other technology decisions – are they synergistic or working against each other?
- What the alternatives are – such as not investing in new equipment but rather increasing the efficiency of existing activities (for example, by applying the ideas of lean manufacturing)
- The full financial costs over the lifetime of any investment
- The knock-on effects – for example, whether new kit will require an increase in turnover and/or new working practices (e.g. multi-shift working) to pay back the investment.

Another common strategic weakness with technology is a failure to understand the complexity and inter-dependence of modern printing workflows. This often means that there are far greater benefits from analysing the entire production processes, and eliminating bottlenecks and other inefficiencies, than focusing on the performance of individual units.

Above all, the best technology strategies are driven by a good understanding of how they will create additional value for customers rather than the thrill of acquiring gleaming metal.

Lean Manufacturing

A recent comparison by the Engineering Employers Federation found that US engineering companies are 25% more productive than British equivalents[3]. The main reason was America's greater adoption of lean manufacturing. This is a strategic approach to production that systematically analyses and eliminate unnecessary costs throughout the supply chain. British printers who've used the techniques of lean manufacturing to improve performance include:

- Bovince, which has cut its materials and utilities costs by 17%
- Pindar, which almost immediately experienced a 5-6% increase in productivity and utilisation by bringing in a new production director with experience of other manufacturing sectors
- Polestar, which believes that they have increased effective capacity at its Varnicoat gravure plant by 40%, and halved make-ready times in its binderies.

---

[3] Engineering Employers Federation, *Catching up with Uncle Sam: the EEF Final Report on US and UK Manufacturing Productivity*, 2001.

The Benefits and Costs of New Investment

If you are thinking of investing in new technology, then it's crucial to identify as many as possible of the costs and benefits which will occur over its life, including:

- Acquisition and Installation – implications of buy versus lease and capitalising or expensing costs; modification costs to workplace; initial training; and delivery.
- Running – net productivity; reliability; wastage and its disposal; maintenance; cost and availability of consumables and spares; software availability and upgrades; continuing training; energy consumption; water consumption and waste; environment, health and safety requirements; flexibility of use (fixed versus variable costs); surplus capacity and how it will be utilised.
- End of Life – alternative uses and resale value.
- Fit with Other Business Activities – skills required and impact on customers.

Once all the costs and benefits are understood you can then analyse whether the investment is worthwhile. The main ways of doing this are:

- Payback – the period required to 'break even', i.e. the creation of financial benefits which exceed the initial cost of the investment? (Remembering to take account of any continuing costs over the period such as maintenance).
- Cash flow profile – to ensure that it won't create any financing problems.
- Return on investment – the profit which should ultimately be generated by the investment, as a percentage of its total cost. The best means of doing this is through discounted cash flow techniques which take account of the timing of the costs and benefits (because a pound in your hand now is worth more than a pound in 2 years' time, and even more than one in 5 years' time).

See www.printmanager.org.uk/strategy for more information on investment analysis.

"Kit is a means to an end - increasing margins and positioning your company for the future"

TECHNOLOGY
PEOPLE
STRATEGY
SYSTEMS
CUSTOMERS

"There should be regular strategic discussion of the implications of MIS data"

Traditionally, printers and systems are like oil and water – they don't mix. But successful strategy requires a much more systematic approach to gathering, analysing, and acting on, information – whilst still avoiding the dangers of too much bureaucracy.

Recording and tracking financial information such as cash flow, gross and net profit, creditors and debtors is a routine part of every business. But the best companies do it more regularly and thoroughly. Management information system (MIS) experts also believe that few printers make optimal use of their systems to shape strategic thinking, for example, about improvement opportunities or investment options. The printers who do this are monitoring on a weekly or even daily basis data such as:

- Financial performance – e.g. gross margin, variations from estimate
- Output – e.g. impressions, plates made, proofs delivered
- Press performance – e.g. utilisation, recovery, number and value of jobs, wastage
- Customer service – e.g. complaints, on-time orders
- Sales data – e.g. average order value, orders taken and forecast, prospects to be followed.

The information will be presented at board meetings with variances from target highlighted. Discussion can then focus on these rather than more routine matters, with the result being problems identified and solved rather than left to get worse.

The important thing is to use the data as the basis for learning and raising and answering questions such as – Are our estimates accurate? What's the profitability of the different jobs we run? What's the profitability of our customers? Which staff are our best performers? What are our bottlenecks and how can we improve them?

Some kind of quality system – following the principles of, if not necessarily accredited to, ISO 9000 is also essential so that opportunities for continuous improvement can be identified.

Lean and Green Systems at Bovince

Between 1995 and 2000 Bovince reduced the total cost of materials, utilities and wastes from 51% to 42% of its annual turnover. Peter Rosen, the MD of the East London screen and digital printers, notes that "we were one of the early printers to adopt both quality and lean manufacturing techniques, and one of the first to get accreditation to the environmental management system standard, ISO 14001, and to Investors in People. We're also one of the few printers to use the Small Business Service's Benchmarking Index, or the European Quality Award template it's based upon, to compare ourselves with best practice. I suppose that's why we've won awards such as a Queen's Award for Enterprise, and were selected as a manufacturing site of world class excellence by the DTI. Even so, our systems are still identifying lots of ideas for improvement, especially on customer service."

"Good systems don't work themselves but need to be underpinned by the right values, and good people. We pay well over national rates, and, as managers, try to set an example for staff to follow. We also select our managers and supervisors very carefully so that they'll pass our values on and develop them further. Our vision is of being a sustainable enterprise, which is both very efficient and also adds value for our community and the environment as well as our customers."

"Systems won't work without committed people and effective leaders"

4. HOW CAN WE GET THERE?

"Strong
leadership
from the
top is vital
– but it's
also
important
to let go
and allow
managers
and other
staff to
participate
in a
strategic
dialogue"

The outcomes of answering the previous questions should be summarised in a business plan. Of course, different sized businesses will have more or less thorough plans – and the largest may have supporting documents such as marketing plans or financial plans. But in every case the plan should provide:

·   Monthly estimates of key financial parameters such as cash flow, sales, profits, costs etc
·   Clear targets – and milestones for achieving them – for the next few months.

It's important too that the regular management team and board meetings have time set aside for strategic discussion. It's all too easy for operational issues to crowd this out unless a conscious effort is made.

These regular meetings can be useful for monitoring small variations, or updating on key changes. But they're unlikely to allow enough time to have a really thorough discussion of important issues. Hence, it's vital to stand back occasionally and look at the bigger picture. In a small company it's also easy for a dominant individual such as an owner-manager to dominate the discussion so that other views are lost.

There are many ways of getting this 'helicopter view':

·   In a very small business, it may be about the owner taking a day or so out to meet with peers or experts
·   In medium-sized ones it might be an annual or even more frequent 'away day' for the management team, or perhaps some kind of benchmarking exercise
·   In all companies it can be by using the audit statements on strategy, customers and markets, people, equipment and technology, and systems in the Appendix to generate a strategic discussion, either self-developed or assisted by an expert facilitator.

Whatever the means you choose, you will almost certainly benefit if you can adopt a more systematic approach to strategy and regularly spend time (it doesn't have to be too much) considering:

·   Where you want to be
·   Where you are now
·   What you have to do to get there.

CASE STUDIES

The following cases show how two companies, Abbey Press and Buckingham Colour Group, used the BPIF's strategic audit, and the questions it contains, to:

· Diagnose their current position, especially their strengths and weaknesses
· Identify – and implement – opportunities for improvement
· Create a shared understanding, and a commitment to change, amongst key staff.

They have also implemented many of the messages of this Guide such as:

· The strategic value of good management information
· The need to base technology decisions on what it will do for customers rather than whether it will impress other printers
· The importance of understanding customers and providing great service to them
· Having regular strategic discussions.

Their positive opinions about the value of the process are representative of all the companies which have given feedback on the audit. When you have read about their experience, why not use it in your own organisation?

You're Never Too Small for Strategy

Buckingham Screen Print has only three permanent staff – a print operator, an administrator and the company's founder, Martyn Ross. Martyn notes that "although we'd done well as a company in the 1990s, I knew I should be spending less time on operational matters and more on our future development. So I participated in an NTO project on management development run by Ashridge Management College. This put me in touch with an owner-manager of a similarly sized pre-press business. He'd been where I was a few years previously so it was great to use him as a sounding board for my thinking. I also attended a project workshop which stimulated lots of thoughts on how we could improve. One big realisation was that, as I'm getting older, I have to work towards an exit strategy. So I'm now gradually transferring tasks to other people so that eventually the business can exist without me."

CASE STUDY
ABBEY COLOUR PRESS

"Little things can send out big strategic messages"

When Mike Edwards acquired Abingdon-based Abbey Press in 1998 he knew that its sales were falling, profit had disappeared, its equipment was outdated, its staff demoralised, and there was no business strategy other than survival. Its core assets – the brand and relationships it had built in 158 years of printing in the town – were therefore in jeopardy.

Following the takeover Mike Edwards used the BPIF's strategy audit process to identify what should be done. The outcome was four short-term objectives:

- To increase sales and profitability
- To restore staff morale and motivation
- To consolidate the two companies' litho printing onto the Abbey site
- To modernise equipment, and increase capacity.

Work also began on three medium-term objectives:

- Changing the company culture to one which was more dynamic, customer-focused and forward-looking
- Strengthening the Abbey brand and building a stronger base in adjacent areas to Abingdon, particularly Oxford
- Developing a group of companies offering a complete graphics solutions service.

By 2002 the business had been transformed. Sales were up by 70%, and profit was improving, despite heavy investment in new equipment and marketing.

Customers and Markets

According to Mike Edwards' Abbey's marketing strategy is "like a hamburger. The bun is our basic bread and butter litho business – which is the bulk of our turnover but only a small contributor to tasty profits. The meat is our reasonably profitable point of sales work, which is mainly digitally printed. And the onions and relish – which really make the difference, so that we want more of them in future – is the fulfilment and other 'total solutions' work we're starting to develop."

Underpinning all of these has been a determined attempt to build on Abbey's 158 years of history and position it as an organic part of local life. The company now sponsors Abingdon United and Oxford United football teams as well as other local activities – including the decoration of a roundabout which won a 'Best Landscaped Feature' award. Mike Edwards believes that "all of these have brought us lots of free publicity, especially the roundabout which is always being commented on. It shows how something quite small in itself can be a very effective symbol of your strategy – in this case our commitment to our community."

People

Mike Edwards is a firm believer that "good people are essential to successful strategy. So one of our medium-term targets is to gain Investors in People accreditation. I also think it's important to go beyond this and think about people's work-life balance so that they don't think of themselves as being in a dead-end job which gets in the way of their personal life. If one of our staff is becoming a father or has a bereavement, for example, I give them some time off to enjoy or deal with it."

Equipment and Technology

The strategy audit revealed market opportunities for four-colour print work, but also the barriers created by Abbey's reliance on two-colour presses to do it. As a result Abbey invested in a GTO 5 colour perfector, both to meet demand and also to build experience as a prelude to further investment. This has now occurred with installation of a five-colour Speedmaster 74, CTP, new pre-press and finishing equipment and a fully digital PDF-based workflow.

Systems

The strategy audit highlighted the need for better management information and Abbey is currently acquiring a state-of-the-art MIS. A key requirement has been the ability of customers to access certain components of it via an Internet browser.

Process

Mike knew when acquiring Abbey "that it would be hard work making the changes that were necessary. What surprised me was the amount of resistance from many of the staff, who wanted life to carry on as it was. I used the BPIF's strategy audit to both identify issues and to start building a committed management team. The process – which involved several meetings of senior managers, facilitated by a BPIF consultant - highlighted why and how we needed to change. Just afterwards a very experienced print manager suddenly became available. I employed him as an interim manager to galvanise progress for a couple of years, which was very successful. By then Abbey management was much stronger and it was time to switch from revolution to evolution."

"Overall I think the audit made a big contribution to our success. It also helped me to realise what strategic thinking meant. Before I'd tended to focus on the future of technology, and then adapt the business plan to that. Now I know that the real skill is in closing off some of the opportunities which technology brings. The fact that an experienced outsider was contributing to the process also gave extra weight to the outcomes. And the discussions helped to identify the staff who were committed to change and those who weren't – with the former now being the senior managers and the latter having left the company."

"Create a shared understanding of the need for change"

CASE STUDY
BUCKINGHAM COLOUR GROUP

"Print e-commerce can cut costs and create new markets"

For Richard Knowles, the chairman of Buckingham Colour Group, strategy is "setting a business direction rather than just letting things happen. In the late 1990s we could see that colour litho print was becoming ever more difficult to make money from. So we tried to look five years ahead and work out where we wanted to be. One element of our strategy has been to try to maintain our print margins by investing in new technology and systems to increase efficiency and customer satisfaction. The other has been to develop new value added activities such as data management, digital printing and e-commerce, initially for our existing customers."

Customers and Markets

Buckingham's turnover increased by 47% between 2000 and 2002, when it reached £6 million. Over the same period its gross margin remained steady at 42% and its operating margin rose from 7.4% to 8.3%. Richard Knowles believes that a major reason has been "our spend on marketing and customer service. We communicate a lot through newsletters, our web site, on-site events and other means. By analysing our customer base we've also managed to identify and focus on several niches that have created some very important customers. We've especially focused on sectors where managers are under pressure to do things quickly and will pay extra for good service and ideas. The other thing we do is to look outside our company and try to identify all the value added components of a piece of work for a customer. We can then try to find ways of bringing more of that value added in-house."

"We've also moved into print e-commerce. This is on schedule to be 20% of group turnover in 2002/3, compared to only 1% in 1999/00. Now we provide corporate customers with on-line ordering of standard items such as business cards and letterheads. As an example, there's one big client where we offered these products as a loss leader. Moving to on-line ordering and proofing allowed us to turn an estimated annual loss of £27,000 on these items into a £13,000 positive contribution! We've also set up an operation giving customers the chance to design personalised posters on a website and then have them digitally printed." JollyBig.com has a massive online library of images of general subjects from pop stars to extreme sports. JollyFast.com is a sister site targeting motor sports fans.

People

Richard Knowles firmly believes that "strategy can't work without the right people in the right positions with high levels of motivation. We achieve this by offering good pay and commissions, good working conditions and by giving staff the freedom to be innovative. I'm delighted when my sales staff earn more than I do. One especially successful idea has been a 20% commission on all extra costs – above the original estimate – which are billed to customers. I picked this up from a benchmarking trip to the US organised by the BPIF."

Equipment and Technology

Advanced technical know-how is seen as critical to Buckingham's new strategic direction. The company has invested around £1.5 million in equipment in recent years and has given IT manager, Peter Beasley, a brief of keeping up to date with technical developments and suggesting how they can be used for innovation. The outcome of this is investment in CTP, digital presses, one of the first reel-fed DC100 presses in the UK and development of a bespoke on-line print ordering application.

Systems

According to Richard Knowles "one of the big exercises we undertook a few years ago was rethinking our management information needs as part of the implementation of our upgraded Shuttleworth MIS. This allows us, for example, to monitor gross profit and deviations from estimate on every job so that we can take action quickly if problems are occurring or margins are slipping. Another example is monitoring the value per impression on our presses. This allows us to spot any changes such as more printing for stock or buying turnover through lower margins. By collecting and monitoring this and other production and marketing information, daily or weekly we usually have a pretty good idea of what the figures are going to be before we get into our monthly board meetings."

Process

Richard Knowles believes that strategy "isn't an instant thing – we're always discussing where we're heading and testing out ideas with customers and the marketplace. Having said that, it's useful to stand back every so often. We found the BPIF's strategy audit very useful for this. Many of the issues it raised were already around and being discussed. But it helped to clarify our thinking and gave us some new ideas. One benefit was reshaping our plans for CTP and workflow reorganisation, which – with some subsequent inputs from a BPIF technical consultant – helped us to do it more cost-effectively. Another was identifying some interesting market niches – such as motor racing – that we were already in but hadn't really capitalised on. I'd recommend that every printer does something similar."

"Monitor key financial and management data to avoid nasty surprises"

APPENDIX
CONDUCTING A STRATEGIC AUDIT

The Process

The statements that follow form part of a strategic process to quickly identify your current position, study areas of concern in greater detail and then develop an action plan to improve. It was first developed outside the printing industry - where it has been successfully used by hundreds of large companies – and was then adapted to the print sector by the BPIF and its consultants.

How does the process work?

At the heart of the process is bringing together key people from different areas of your company for a structured strategic discussion. This is achieved by asking them to choose which one of four statements for each strategic issue they most agree with. The statements are numbered 1 to 4, with 4 intended to give a sense of industry best practice[4]. There is then a discussion of the answers which people have given, and why.

What are the outcomes?

Usually there is:

- A realisation that there are differences of interpretation, knowledge etc. which may be impeding success
- A raised awareness that there is a need – and that there are opportunities – to improve performance
- A better shared understanding of what the strategic issues are and what should be done about them
- Better individual knowledge of the situation of other people in the company that can result in improved working relationships.

In companies which don't have structured management meetings to regularly bring together all senior managers the process can also demonstrate the advantages of this for effective decision-making, and thereby kick-start its introduction.

Of course, there is a risk that a process of this kind can reveal – and even exacerbate – real disagreements which are hard to bridge. Although experience shows that this isn't usually the case, it is a strong argument for using a neutral facilitator (see below).

---

[4] There isn't always a consensus about what best practice is and, of course, it also changes with time. The statements represent the collective view of industry experts at the time they were developed. They should therefore be treated as ways of getting people to think rather than unchallengeable definitions of what is good or bad.

Who should I involve internally?

Ideally you should initiate this process with a small team of people who cover different aspects of the business. If you have choices about who to involve, consider:

- Who has the key knowledge relevant to the areas covered by the statements?
- Who will be important in implementing any action plans?
- Who might benefit from the improved understanding of issues faced by others within the company which usually results from the process?

Process facilitation

The maximum benefits from this process are likely to be achieved by using a neutral facilitator because:

- Companies tend to start improvement initiatives with the best intentions and then after a period of time forget all about them. Involving an outsider to facilitate the process who will visit regularly to encourage effort is a good way of keeping the momentum going.
- An outsider will see the company differently to those immersed within the culture and politics. As discussions progress it is useful to have someone who can ask basic questions, which are otherwise likely to be overlooked.
- Good facilitators will have had specific training to be most effective. Strong facilitation skills are not normally found in companies that are unfamiliar with this approach. This is not a role for an ineffective manager!

The facilitator must have a good understanding of the issues facing the industry in order to be as effective as possible.

The Process Itself

We recommend six steps:

- Team assessment
- Identifying issues
- Further research
- Brainstorming and evaluating solutions
- Target setting
- Taking action.

Step 1 Team assessment

Each member of the team, working individually (and ideally at least the day before the exercise so that they have time to think), should note which of the following statements best describes the current position of the company. The result provides an initial indication of the company performance as viewed by each individual. Difference between the scores are then discussed by the whole team to form a consensus view. This consensus view is the end point of this step.

Step 2 Identifying issues

The facilitator should generate a list of the key issues that have emerged from the discussion. These are then played back to the team, who make a selection of those that seem to be a) critical to success and b) capable of action in the near future. The next steps then focus on this 'short list'. Some companies find that they can use the same meeting for both steps 1 and 2. Others find that two meetings – with time for reflection about the initial discussion – are more effective.

Step 3 Further research

When the critical issues have been identified in step 2 they will need to be researched further in order to provide the team with a 'data based' (as opposed to 'gut feel' based) understanding of the current situation. One or two individuals can be given responsibility for this.

Step 4 Brainstorming and evaluating solutions

The team reforms at this stage and is presented with the findings of the further research. A brainstorming process addresses each issue in turn and identifies possible actions that can be taken. The actions are then evaluated and a decision is made as to what will be prioritised.

Step 5 Target setting

This involves defining what is to be done by when, who is responsible and how progress can be measured. Key milestones need to be identified and agreed. The aim is to have a relatively small number of actions on which attention can be focused so that their achievement is more likely.

Step 6 Taking action

One or two people need to have clear responsibility for this, with a mechanism for reporting back on progress. This can be either a further session of the team, or a more regular meeting such as a management board.

THE STATEMENTS

STRATEGY

Existence

1. No strategy beyond day-to-day survival. .
2. Strategic objectives set but aren't widely understood and/or don't influence the day-to-day activities of key individuals or departments.
3. Strategic objectives set which are understood by key individuals and which do influence their day-to-day activities – but more could be done to develop a vision of where the company is going and how it will get there.
4. A clear and widely shared vision of where the company wants to be in 2-3 years time and how it will get there. Understood and implemented by all departments and staff. Widespread understanding of the business planning process.

Strategic opportunities

1. Lagging behind most companies in productivity, sales and profit growth.
2. Average productivity, sales and profit levels but many opportunities for improvement in both areas.
3. Good levels of productivity, sales and product growth compared to many competitors but still scope for further improvements, which have not yet been properly identified or implemented.
4. High levels of productivity, sales and profit growth – recognised as a leader in both areas. Further improvement opportunities understood and being acted upon.

Understanding of competition

1. Limited understanding of present or future competition.
2. Some understanding of current competitors but little thought about potential new competitors – responses to actual or threatened competitor initiatives only made on a reactive basis.
3. Good understanding of the product/service offerings of all important current competitors. Some consideration of the threat from new competitors. Unstructured discussion on how to maintain and strengthen existing product/service packages and develop new ones.
4. Thorough understanding of the product/service offerings and strengths and weaknesses of all important current competitors. Detailed, structured consideration of opportunities for existing or new competitors to deliver superior product/service packages. Leads to continuous improvement of existing products/service packages and the development of new ones.

Financial management

1   Cash flow only managed in a crisis.

2   Cash flow managed but debtor days high. Considerable scope for improvement.

3   Effective systems for invoicing, tracking amendments and collecting of payments so that debtor days are at a low level. Limited regard to linking short-medium term cash flow projections with other activities such as selling, scheduling and procurement.

4   Effective systems for immediate invoicing, tracking chargeable amendments and collecting of payments so that debtor days are at a low level. Very regular projections of short to medium term cash flows and costs in order to influence sales activities, scheduling and procurement and minimise financing costs.

Financial strategy

1   No consideration of medium-long term financial issues.

2   Limited consideration of medium-long term financial issues.

3   Long-term financial targets set and some consideration given to future funding requirements.

4   Long-term financial targets and funding requirements identified and integrated into strategic and operational plans. Good knowledge of, and relationships with, potential funding providers so that finance is quick and easy to obtain on good terms when required.

Relationships

1   Business relationships are about one side winning and the other losing. Limited trust.

2   Reasonable relationships with customers and others but no real attempt to identify ways of strengthening them or building new ones.

3   Good at building and maintaining lasting relationships with a wide variety of organisations and individuals. Room available to deepen and extend relationships further.

4   Excellent at building and maintaining a wide variety of relationships, based on a constant search for win-win opportunities for both parties and a willingness to explore new ways of working.

CUSTOMERS AND MARKETS

Marketing

1. Almost complete focus on selling existing products to known customers.
2. Some knowledge of market-place changes and their likely effects on existing customers. Limited action focused on identifying new customers or developing new or improved products/services which will better meet the needs of existing customers.
3. Regular analysis of market trends to identify and take advantage of new market opportunities and to counter threats. However, more could be done.
4. A market-focused company that is constantly seeking to improve existing and offer new product/service packages. Improvements are based on a deep understanding of existing and potential customer needs and the ways in which these are influenced by the customer's customers.

Customer value

1. Customers buy our products/services. No further analysis undertaken.
2. Occasional analysis of value provided to customers. Limited subsequent action.
3. Regular analysis of value provided to customers. Opportunities to increase value exist and are exploited in an unstructured way.
4. A very clear understanding of how customer value is delivered exists. Customer value is increased as a result of implementing a plan aimed at achieving the desired improvement by systematically building on strengths and addressing weaknesses.

Customer retention

1. Little planned effort to retain customers.
2. Key accounts identified and monitored in an *ad hoc* manner.
3. Key accounts closely and regularly monitored and some detailed attempts made to segment all customers in terms of their profitability and strategic potential and to understand their level of satisfaction with existing products and services.
4. A thorough understanding of the needs, profitability and strategic potential of all customers. High level strategic discussions with key customers. Customer satisfaction levels and customer service standards regularly measured.

Promotion

1. Little attempt to promote the activities of the company.
2. Some formal promotional activity. Effectiveness is not monitored.
3. Promotional methods currently used based on historic assessment of effectiveness.
4. All elements of promotional activity carefully monitored in comparison with own and competitor performance. Strategy for expanding service and customer base clearly communicated and fully understood.

Customer communication

1   Communication with customers is poor and the cause of many problems. Much money is wasted in a number of ways due to poor communication.
2   Communication with customers is weak. Some attempts to improve this but still a number of problems exist.
3   Communication with customers good but repeat issues still occur.
4   Excellent communication with customers who make you part of their team. New methods of communication regularly appraised and used where appropriate.

PEOPLE

Skills and training

1   Staff skills not analysed and very little training done.
2   Skill gaps recognised and addressed but only in a limited, *ad hoc*, manner.
3   Skill gaps recognised and addressed in a number of ways, e.g. training plans, and appraisals. Some room for improvement in the execution of these management systems.
4   Few skill gaps. Where they exist they are addressed methodically (for example, through training needs analysis, skills matrix) through existing management systems. Opportunities for individuals to identify their own development needs.

Responsibilities and communication

1   Unclear responsibilities combined with poor internal communication create costly problems for the business. Responsibilities are discussed, but only after a crisis.
2   Job profiles exist but are not up to date. Unclear responsibilities and poor internal communication create problems for the business.
3   Stated responsibilities and reasonable internal communications but still some problems, e.g. relating to cross-functional processes or in dealing with customers.
4   Responsibilities clear in all areas of the business, including key cross-functional processes. Highly effective internal communication.

Workflows

1. No understanding of the concept of workflow (the ways in which work is handled from customer origination through pre-press and production and back to customers) and therefore no attempt to analyse and improve it.
2. Limited understanding and discussion of workflows. Small parts of the overall process from order receipt to finished product delivery are considered in isolation, prior to implementation of improvements.
3. Workflows understood and regularly analysed and considerable attempts to reduce bottlenecks and 'pre-flight' test incoming files (i.e. check for common errors). Limited emphasis on working with customers to resolve repeat problems.
4. Strong understanding of workflows in all areas from receipt of instruction through to delivery of finished product. Analysis and action to improve and reconfigure workflows for business benefit (e.g. customer education to eliminate basic cause of workflow problems).

Technology

1. Little knowledge of new technology.
2. Some knowledge of new technology amongst a few people but not sufficient to really keep up with developments.
3. Good knowledge of new technology amongst a number of business functions, covering most standard hardware and software. However some knowledge gaps still need to be filled.
4. Full knowledge of new technology and regular evaluation of new hardware and software across all business functions. In-house ability to modify and customise technology to suit company and customer requirements.

SYSTEMS

Continuous improvement

1. No formal processes to ensure quality and continual improvement.
2. Some processes to ensure quality and continuous improvement but these are neither fully documented nor integrated with each other
3. An integrated management system, with documented processes, to ensure quality and continuous improvement.
4. An integrated management system and documented processes to ensure quality and continual improvement. Reviews have ensured that these are delivering real business benefits.

Management information

1 Management takes place in a vacuum with little of the information required to do the job properly.
2 Some of the information needed to manage the business exists but much better use could be made of it.
3 Most of the information required to manage the business exists and it is used regularly. Areas for improvement exist but have not been addressed.
4 All the information required to manage the business exists and is used regularly. Information exists on utilisation of labour, equipment, materials and the effectiveness of workflows. The effectiveness of our information reports are regularly reviewed and are changed to eliminate issues that occasionally arise.

Monitoring and calibration

1 Equipment is not monitored or calibrated until jobs are rejected by the customer.
2 Production problems indicate when equipment needs monitoring and calibrating.
3 A monitoring and calibration system exists but is not implemented thoroughly.
4 A system is in place and is used to monitor and calibrate equipment at very appropriate intervals – in some instances daily – and, where appropriate, colour management software is used.

SYSTEMS

Kit

1 There is a major mismatch between existing equipment and the equipment required to meet company strategic objectives.
2 Existing equipment is partially aligned with strategic objectives but considerable investment is still required.
3 Strategic objectives can be met with existing equipment with limited further investment.
4 Strategic objectives can be met with existing equipment.

Networks

1 Equipment is not networked.
2 Equipment is networked but major problems are experienced, e.g. with equipment and software incompatibility and slow file transfer and retrieval. The cause of the problems is not understood by anyone inside the company.
3 A network exists and delivers satisfactory performance. Optimal performance understood but not achieved, e.g. in speed of file transfer, retrieval and output.
4 The network works well and no significant bottlenecks or other problems exist. Technical developments are followed closely and sufficient internal knowledge exists to identify and implement improvement opportunities. Business benefits arising from the Internet and Intranet have been considered/realised.

Communications

1   The post, telephone and fax are the only communication tools.

2   A modem has been installed but is not used on a regular basis.

3   A variety of electronic forms of communication are used to receive and send out jobs and job-related information but they are not exploited to their full potential. No one fully understands the new developments in this area. No assessment has taken place of the business opportunities that could be created.

4   A variety of electronic forms of communication are used to receive and send out jobs and job-related information. Internally the available technology is fully understood and monitored. Regular reviews take place of the opportunities that exist to create customer value and improve profitability.

Business case

1   Equipment is bought primarily on the basis of its technical features, price or availability rather than an evaluation of how it will meet business needs.

2   The overall business impact of new equipment is considered but not to any great detail.

3   Detailed evaluation of the overall business impacts of new equipment, including its implications for skills and training and the type, volume and pricing of work undertaken in future.

4   A full evaluation of its business impacts is undertaken, such as implications for skills and training and the type, volumes and pricing of work undertaken in the future. Input is sought from existing and potential customers to ensure that the equipment will create competitive advantage.

Total cost of ownership

1   Only the purchase price of new equipment is considered.

2   Only the purchase price and immediate up-front costs, such as installation and initial training are considered.

3   Some of the lifetime costs connected with ownership of the equipment are included, such as costs of maintenance and software upgrades.

4   All costs associated with ownership of the equipment are included. Realistic estimates are made of how long it will be before technical change makes the equipment obsolete. Figures are validated by consulting equipment suppliers.

CONTACTS

British Printing Industries Federation
Farringdon Point, 29-35 Farringdon Road, London EC1M 3JF
Tel 0870 240 4085 www.britishprint.com

European Flexographic Technical Association (EFTA)
4/5 Bridge Barns, Langport Road, Long Sutton, Somerset TA10 9PZ
Tel (01458) 241 455

Scottish Print Employers Federation (SPEF)
48 Palmerston Place, Edinburgh EH12 5DE
Tel (0131 220) 4353 www.spef.org.uk

Picon
St Christopher's House, Holloway Hill ,Godalming, Surrey GU7 1AZ
Tel (01483) 412 000 www.picon.com

Screen Printers Association
Association House, 7a West Street, Reigate, Surrey RH2 9BL
Tel (01737) 240 792 www.spauk.co.uk

PIRA
Randalls Road, Leatherhead, Surrey KT22 7RU
Tel (01372) 802 184 www.pira.co.uk

or you can find a list of local contacts for the DTI's Manufacturing Advistory Service at www.dti.gov.uk/manufacturing

FACING THE FUTURE
THE PRINTERS' GUIDE TO STRATEGY

British Printing Industries Federation

Farringdon Point
29-35 Farringdon Road
London EC1M 3JF
Tel 0870 240 4085
Fax (020) 7405 7784
E-mail info@bpif.org.uk
Website www.britishprint.com

**Registered with the DTI MAS as a
Centre of Expertise in Manufacturing**

mas

THE DTI MANUFACTURING ADVISORY SERVICE

BPIF is a partner of

Fit for the Future

business learning from business

BPIF Regional Business Centres

Eastern Tel (01638) 667 153
Midland Tel (0121) 789 7222
North Eastern Tel (01924) 363 813
North Western Tel (0161) 886 8400
South Eastern Tel (020) 7915 8400
South Western Tel (0117) 942 8794