

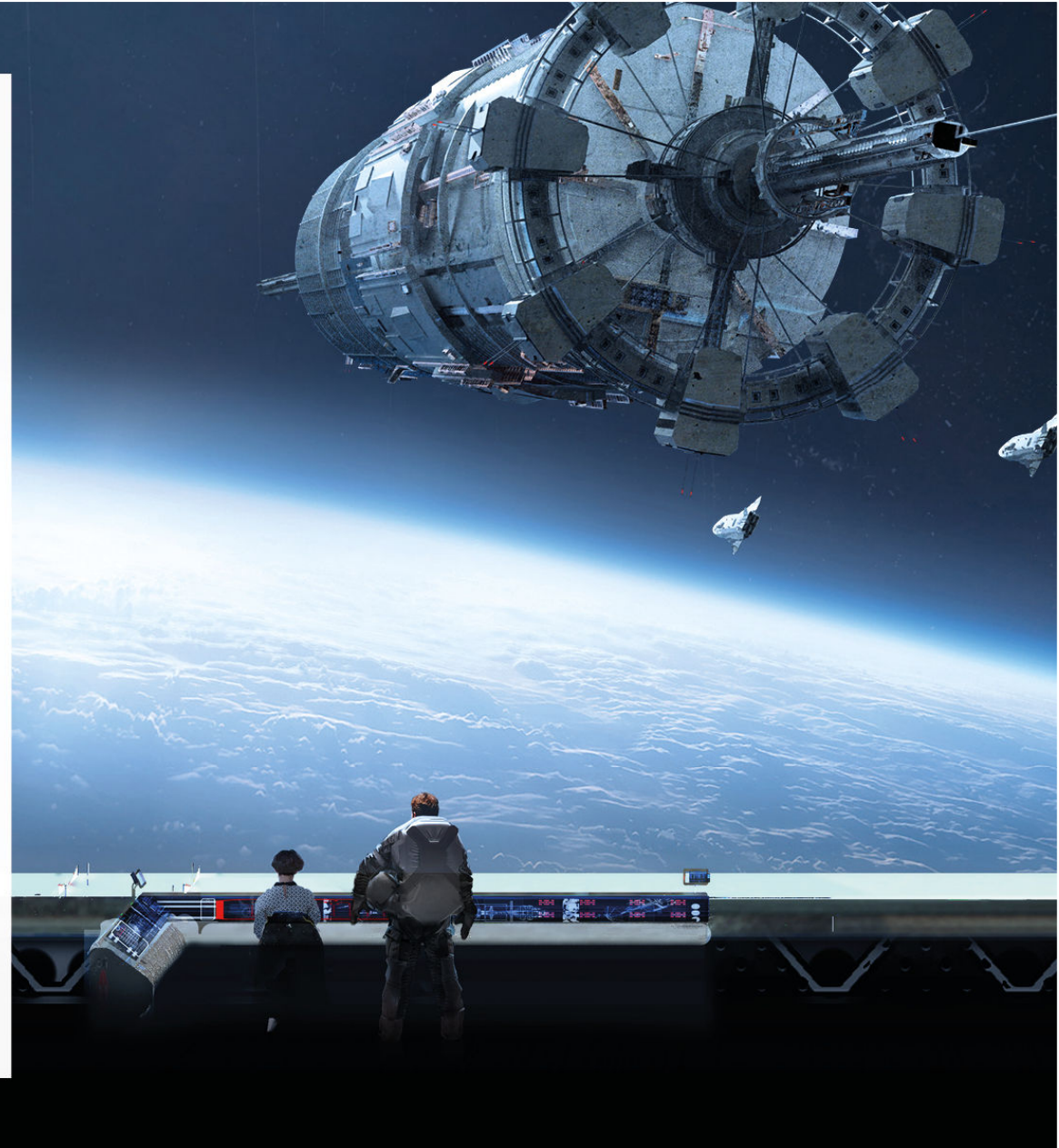


SheetLabels.com

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President & CEO
SheetLabels.com



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Who is SheetLabels.com?

- Headquartered in Glens Falls, NY 12801
- Approaching 40 Full-Time People
- Serving 4,000+ Customers Monthly
- Specializing in Short and Micro Run Printed and Blank
- eCommerce with Proprietary Software:
 - Online Proofing and Label Design
 - Automated Order Entry
 - From Placement to Production in Seconds
 - Automated Communications



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Thriving in a Print-on-Demand World

- Rise of Frequently Changing Consumer Demands
- Trends Impacting Label Converters
- Increased Competition for Private Label Brands
- Digital Workflows are Everywhere
- How to Improve Your Print-on-Demand Offering
- Streamline Your Communication Processes
- Optimize Your Inventory



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Rise of Frequently Changing Consumer Demands

- Technology = New Expectations
- Time to market in B2C is getting shorter
- Direct Connection to Producers/Manufacturers
- Same Day, Next Day Delivery – Prime, Jet, retailers
- Digital Printing Technologies – Increasing variability
 - Clothing, promotional products, commercial print, mailer campaigns
 - Digital messaging puts pressure on print industry
- Subsidized Cost Structures – Attractive to younger demographics
- “Text to Order” – Communications are instant
- All of this lead to Print-on-Demand



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Trends Impacting Label Converters

- Microbreweries: 3,812 in 2017, a 19.3% increase over 2016
(*BrewersAssociation.org*)
- Craft Distilleries: 1,589 in 2017, a 26% increase over 2016
(*AmericanCraftSpirits.org*)
- Hundreds of E-cigarette Brands: \$5.5b in 2018 (*Forbes.com, Wells Fargo*)
- Cannabidiol (CBD) Growth: \$2.1b by 2020 (*Forbes.com, Hemp Business Journal*)
- Private Label Brand Growth: Shelf space increasingly favors private label (Lidl, Kroger, WholeFoods, etc.)



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Increasing Competition for Smaller Private Label Brands

- Craft Beverage Market Example
 - Varying flavors
 - Varying styles, sizes, options
 - First-to-market demand of fresh local ingredients
 - Exclusivity of hops and ingredient suppliers
 - Weekly new product launches – tighter deadlines, increased variations
- Local Farmer's Market Example
 - Farmers Markets – new flavors, new brands
 - Rotating flavors, variations
 - "First to try" behavior – instant gratification
- National Brands
 - Creating 'seemingly' local organic varieties
 - National producers acquiring smaller artisan brands



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Digital Workflows are Everywhere

- Faster Transaction Time (even our credit cards are processed faster, Apple Pay, etc.)
- Mid-flight changes becoming normal (consumers can edit orders after they are placed)
- Shorter Purchasing Cycles = Faster and Easier
- Graphical User Interfaces are Everywhere



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Improve Your Print-on-Demand Offering

- Increase Flexibility
 - Increase label size offerings, limiting material choices
 - Allow Customers to gang with other Customers
 - Decrease your minimum, allow for faster turnarounds
 - Invest in smaller digital technology to reduce cost per order
 - Automate, wherever possible
 - Automate Proofing of Re-orders
 - Produce similar orders in production together
 - Combine sales territories with "like customers" to group similar ordering behaviors
 - Offer Free Shipping, Combined Unit Gang Pricing (when digital or gang like Customers), Subsidize Tooling & Setup Costs



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Streamline Communications

- Communicate Every Step
 - Order placement confirmations
 - Order status changes
 - Edits to orders need to be confirmed with Customer
 - Frequent updates to orders throughout entire order experience
- How?
 - Implement a CRM (Salesforce, etc.)
 - Email Notifications, Text/Call, Chat Automations (ConstantContact, Olark, etc.)
 - Order processing software for in-plant tracking (CERM, LabelTraxx, etc.)
 - Digitize Proofing and Pre-Press Process
 - Collect User Feedback (Net Promoter Score, Surveys, etc.)



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Optimize Your Inventory

- Use Trailing Measures
- Digitize Production Processes
 - Order Tickets/Jackets – go electronic whenever possible
 - Gang Like Orders in Queue – group orders based on label size, material
- 3 Month, 6 Month, 12 Month Trailing
 - Inventory
 - Sales
 - Order Frequency
 - Average Order Sizes
 - Label Sizes, Features, Coatings, Laminations, etc.
 - Create Predictable Forecasts to Improve Turnarounds



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Print-on-Demand Summary

- Consumer Demands are Frequently Changing
- Local Brands and Quickly Changing Varieties
- Use Digital Workflows Whenever Possible
- Subsidize Costs Across Multiple Customers (Free Shipping, Free Setup)
- Combine Offerings to Gang Whenever Possible
- Use Electronic Communications Throughout Order Process
- Use a Trailing Measure of Inventories, Sales Data



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Thank you!



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