

# 84<sup>th</sup> Annual International Management Conference – PIMA

*New York City, New York*

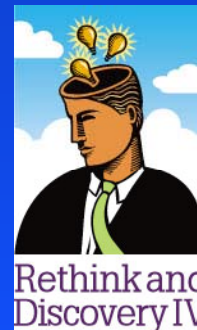
*June 29 – July 2, 2003*

---

-- End Users' Panel --

*Rod Young -- Introduction*

*Review of the Marketplace by the End User*



# ***PIMA End Users' Panel – Session Chair***

***Review of the  
Marketplace by  
the End User –  
Customers/  
End Users/  
Buyers Define  
Value***

**Rod Young  
President  
RISI**



# THE CONSUMER ECONOMY



# Alan Procter President

- **ALAN PROCTER  
CONSULTING INC.**

- ✓ **Strategic Assessments**
- ✓ **Future Focused Perspectives**

**Alan R. Procter Consulting Inc.**



# Lisa Taner

## Manager Paper & Production Services

- **NEW YORK TIMES COMPANY**

- ✓ **Worldwide User of Paper Products**
- ✓ **Worldwide distributor of information**



# David Refkin President

- **TI PAPERCO (TIME INC.)**
  - ✓ **Paper Purchasing Subsidiary of Time Inc.**
  - ✓ **Provides Needs of AOL-Time Warner**



# Jody Lowe

## Purchasing Manager

- **PROCTOR & GAMBLE**
  - ✓ **Corrugated Packaging**
  - ✓ **Paper Businesses Fiber Based Packaging needs**



# Mark Eisner

## Director, Paper Purchasing

- **Hachette Filipacchi  
Media US Inc.**
  - ✓ **US Subsidiary of  
Hachette Filipacchi  
Médias**
  - ✓ **Largest Global  
Magazine Publisher**



# Keys To Business Success

- **Understanding --**

- ✓ **Who Your Customer Is;**
- ✓ **Your Customers' Needs;**
- ✓ **Your Customers' Expectations; and**
- ✓ **How Best to Serve Major Clients**

- **Does Today's Paper Industry Behave as If it Has These Understandings -- Grasps these Crucial Concepts? ? ? ? ?**



# Goals for Today

- Five Enterprises Associated With the Paper Industry – Four Major Customers
- Will Tell Us *How Important Understanding Our Customers Is*
- What Happens When We Don't
- How Well We Are/Are Not Doing
- Understand Better The Needs for *Customer Focus*



# Thank You

