



*Work Portfolio
May 11, 2018*

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1. CASE STUDY FOR TRADE MAGAZINE/WEBSITE

Client: National Ornamental and Miscellaneous Metals Association

This is a *very* detailed case study describing how the spire at the top of the new One World Trade Center in New York City was topped of with an award-winning beacon housing fabricated by a NOMMA member.

More NOMMA magazine articles I've written are available at <http://issuu.com/fabricator>.

Kammetal
29 Imlay Street
Brooklyn, NY 11231
info@kammetal.com
Tel: 718-722-7400
www.kammetal.com

Other notable links:

http://www.som.com/projects/one_world_trade_center

<http://www.panynj.gov/wtcprogress/>

<http://time.com/world-trade-center>

Project: One World Trade Center beacon housing

Clients: DCM Erectors, Tishman Construction, The Port Authority of New York and New Jersey

Architect: Skidmore, Owings & Merrill, LLP, New York City

Engineer of Record: BuroHappold Engineering, New York City

Completion Date: April 2013

Scope: Engineering, design development, glazing, stainless-steel fabrication, installation

Kammetal's lessons to share:

- While bidding on a project, “ask the right questions and address the right concerns.”
- Don't be too timid to question decisions of even world-renowned architects, particularly on their choice of metals and metal finishes for a particular job.
- Strong vendor relationships can come in handy at the most inopportune times.

Top Job Gold — Category: Structure

Molly A. Badgett

Inspiring One World Trade Center

A coveted beacon housing assignment marks Kammetal's growth in a remarkable way

Great English literature aside, Sam Kusack will likely remember the year 2001 as the best of times and the worst of times. For him, however, the story of a bittersweet year, punctuated by the epic tragedy of 9/11, has had a happy ending.

As a graduate of The Cooper Union for the Advancement of Science and Art in Manhattan, Kusack opened his own metal-fabrication firm in June of 2001. With no family background in the industry, this first-generation fabricator had prepared for that milestone through years of working off-hour side jobs. He admits to being a bit of a business opportunist while at Cooper, too, crafting metal display tables and sculpture components for artists and art galleries — out of the school's shop.

That summer, with a Bachelor of Fine Arts in hand and a number of jobs lined up, Kusack was ready to hang his shingle in a Brooklyn, NY, loft workspace he shared with friends. Working through the horror of 9/11, as all New Yorkers did, little did Kusack know then that his handiwork would eventually play a high-profile (in every sense of the word) role in a symbolic event to mark the city's comeback.

Just 11 years after he witnessed the fall of World Trade Center towers at the hands of terrorists, Kusack's company, Kammetal, was selected to fabricate the housing for the top-feature beacon of the new One World Trade Center, initially and often still referred to as Freedom Tower. The project won Kammetal NOMMA's 2014 Top Job Gold award in the Structure category.

"It was interesting from the standpoint of being a business owner having created the company at that time," Kusack said, with certain modesty about having had the capabilities as a relatively young company to perform the work.

Established and equipped

A city like New York has no shortage of demand for artistry in metal. In meeting that demand, Kusack's firm had grown to a company of about 25 employees since 2001, positioning itself as largely artistic in nature. Art fabrication projects encompass as much as 30 percent of the company's work, which is predominately from sheet metal. High-end furniture and other interior pieces, such as heavily stylized lighting fixtures, are just as commonplace from Kammetal's shop as are interior staircases or other large-scale, architectural projects.

Kusack's shop was well-suited, then, when he got a call from DCM Erectors (USA) asking if he and his team would be interested in a project involving the World Trade Center. A division of The Davis Group of Canada, DCM Erectors was the firm hired by The Port Authority of New York and New Jersey to construct the building.

"We said, 'Sure! Of course,' Kusack said. "They gave us a typical non-disclosure agreement and said they would send the drawings over. When I opened them up, I was pretty excited to see it was for the beacon." Kammetal was one of about 15 firms to bid on the job.

"We had a good grasp on the work and were detailed-oriented and capable in-house to do the work," he said. "From there, it was really a matter of delving into the details, through the specifications, and understanding the project. As an architectural and ornamental fabricator, it's all in the details."

Project design

At 55 feet in height, the ultra-modern beacon housing was designed by New York architectural firm Skidmore, Owings & Merrill (SOM) to complement the torch of the Statue of Liberty, Kusack said. The beacon, after all, is seen by many as a contemporary version of the Statue of Liberty's symbolism, visually balanced across the Hudson River. It's also highly functional, housing the large, rotating LED-lighting apparatus and capping off the building's 408-foot spire (see sidebar).

From the start, Kammetal's input was significant. The beacon enclosure was originally specified as an aluminum structure with a powder-coated finish. Kusack didn't see that material as a viable option based on the high-altitude performance required of it in New York City's climate.

"We suggested going away from painted aluminum to stainless steel," he said. He got acceptance for the change by SOM, whose structural engineers agreed the weight differential for the heavier 7-gauge-steel cladding wasn't a concern.

Measurements and fabrication

DCM Erectors provided Kammetal with the 10-ton, structural-steel frame, the core "skeleton," for the project and about a dozen of Kammetal employees began their dedicated work by doing an entire three-dimensional laser

scan of the frame. The objective: develop a point cloud, or set of data points, for creating the finished product, a 7-ton, steel-and-glass cone — with absolutely no right angles.

Starting in October 2012, staff worked at Kammetal’s Red Hook shop in New York to fabricate all the components that would be attached to the core structure, and to install them at DCM Erector’s shop in New Jersey. They worked almost conceptually as the frame lay horizontally across the shop floor. Measuring 9 feet at its widest point and 2 inches at the lightning rod on the other end, a movable welding positioner supported the frame. In addition to using cranes for placement, the workers devised a pneumatic, “suction-cup” lifter so they could add the project’s glass components, sideways.

The Kammetal fabricators first consulted with BuroHappold Engineering in New York City to verify the structural integrity of the work in “as built” conditions, such as extreme weather at the top of the building. The building, by the way, would eventually rise to a symbolic 1,776 feet in the air to become the tallest in the Western Hemisphere.

“The engineers analyzed our design, and we worked together to modify the parts as necessary,” Kusack said. “We reengineered the entire exterior structure. We did thermal expansion and movement tests; we sectioned each panel to fit together.” Throughout the process, the engineers and the Kammetal crew worked closely also to ensure the integrity of the complex welds at their challenging, compound angles.

In the end, the key element needed to making everything work was a system for piecing the triangle-shaped panels together and attaching them to the frame while maintaining the design elements, and in a way that would withstand significant weather-related movement.

“We designed a proprietary clip system,” Kusack said. The unique fasteners allowed the company to lock most sections of the 48 panels in place; others were secured to weld studs. The company also devised a custom gasketing system between each of the panels and between the steel and glass panels.

Aside from dealing with the epic inconvenience of Hurricane Sandy, which hit the shop in late October, the complexity of all the project pieces was the most challenging element to address.

“It was the engineering and coming up with solutions for all the technical aspects of the project,” said Kusack. “It was the most time-consuming aspect, all the pieces and parts.”

Finishing and installation

The 316-grade stainless steel used to clad the beacon housing was purchased in a non-directional satin finish from New Jersey-based Dynasty Metals. In all, 6 tons of stainless steel were used, along with 1 ton of tempered and laminated Oldcastle-brand glass. Fitted with steel surrounds, the 1-inch-thick glass panels provide the New York skyline a lighthouse-like effect from the FAA-approved lighting assembly inside.

To lift the 7-ton, 55-foot cone to the top of a building more than 1,700 feet into the air, Kammetal and DCM Erectors placed the entire unit, even before it was completed, on a custom-made traveling platform fabricated by DCM. Then, from the time it was 100% completed in late March of 2013 until it was hoisted atop the building that May, the beacon housing remained on the development site away from public view. In the last two weeks or so before it was installed, the housing sat on the roof of One World Trade Center, still more than 350 feet away from its final placement.

On May 10, the entire beacon section, along with the last of the spire and a U.S. flag, was ceremoniously lifted in place; a bit of history was made.

“We watched the installation from our shop,” Kusack said. He and the crew at Kammetal, which sits across the Hudson from the WTC site, had a direct view. “We took a break to check it out and then went back to work.”

No celebration? No champagne?

No, Kusack said. “But seeing the towers fall in 2001 and having the privilege to actually build the beacon, it was an honor, for sure.”

The Kammetal crew, now numbering closer to 30, has done larger jobs, Kusack said, but not like this. “Not in terms of being exposed to the elements at 1,700 or more feet, and the nature of the project. Everyone looks at it.”

SIDEBAR 1

Mother Nature deals the biggest blow

In late October 2012, just after starting on the World Trade Center project, Hurricane Sandy struck the Kammetal shop. Considered the second-costliest hurricane in U.S. history, Sandy hit hard the hip, up-and-coming industrial district in Brooklyn known as Red Hook.

Except for the massiveness of the storm, some flooding from Sandy likely was predicted since the area is designated as hurricane Zone 1, an area most in danger of flooding.

During Sandy, Kammetal took in about two and a half feet of water.

“It was during the engineering phase; it took out a lot of our equipment,” Kusack said. “One of our machine vendors actually made a huge effort to get us back up and running.”

The vendor was German-based TRUMPF Inc., which has an office in Farmington, CT. “I scheduled a meeting with them and went to Connecticut to their U.S. headquarters,” Kusack said. “I met with their management and told them about the project and the position we were in.”

Kusack wasn’t in any position, however, to purchase all-new equipment. “We came up with a plan, and they offered to give us a loaner machine.” In time, Kammetal had its own TRUMPF machines and others up and running, but for about six weeks, the shop was off the power grid, running solely from a generator.

SIDEBAR 2

Permanent spire, or antenna?

Controversy has surrounded redevelopment of World Trade Center property since the first time anyone breathed a word about it.

One World Trade Center, for example, was initially to be developed by New York's Silverstein Properties, which was leasing the original Twin Towers and other buildings of the former WTC complex. But in April 2006, ownership transferred to the Port Authority of New York and New Jersey, in partnership with the Durst Organization.

More recently, controversy focused on the 408-foot spire on top of the building that is topped off by the beacon housing Kammetal fabricated. That's because the Council on Tall Buildings and Urban Habitat (CTBUH) determines a building's "official" height based on whether or not the mast on top is a "permanent architectural feature, not a piece of functional-technical equipment."

Had the Canada-built spire on top of One World Trade Center been determined to be simply a broadcast antenna instead of a permanent fixture, the building would have been denied its status as the tallest in the Western Hemisphere and the third tallest building in the world.

In announcing the CTBUH's decision in November 2013, Executive Director Antony Wood was quoted as saying, "The design of One World Trade Center, as explained to us, reinforces its role as a symbol of resurgence on this important site. In particular, the spire, which holds the beacon light, shining out at the symbolic height of 1,776 feet, is especially poignant."

What makes Kammetal tick:

Kammetal relies on — and constantly invests in — sophisticated, modern machinery as much as the precise planning, engineering, and craftsmanship of its project managers, engineers, and designers. Its assets include:

- **TIG and MIG welding.** Kammetal is GTAW-, GMAW- and AWS-certified.
- **Set-up and fixturing.** Precision welding table stations used.
- **Project planning and installation.** Includes rigging and fitting.
- **Hand operations.** Includes heat bending, twisting, and forging in stainless steel, steel, and copper alloys.
- **CNC machining.** Kammetal's equipment includes:
 - CNC laser cutter (Trumpf TruLaser 1030)
 - CNC turret punch (Trumpf TruPunch 1000)
 - CNC press brakes (Trumpf TruBend 5170S and 7036)
 - CNC plate roller and CNC plate controller (DAVI MCA 3020)
 - Waterjet cutter (Flow Mach 4, 4030C)
 - Automatic saw (Marvel 380A PC3)

2. VERTICAL CAPABILITIES BROCHURE/WEBSITE COPY

Client: Acuity Brands, Inc.

As one of the nation's largest manufacturers of commercial lighting, Acuity Brands decided in 2014 to begin focusing on vertical markets for its marketing communications. This very dynamic, 12-page brochure was its first to market its multi-brand offerings of industrial lighting products and services to manufacturers.

Challenges included speaking directly and personally to the target audience without being too gratuitous, and to incorporate key SEO terms into the text while clearly defining the company's value proposition.

Cover

Lighting & Controls Solutions
Manufacturing

Page 2

Header –

**Your productivity is everything.
Maximize it with our lighting solutions.**

Subhead –

Your best equipment isn't always on the production floor.

Text –

In manufacturing, lighting is about more than illumination. Lighting should also promote safety, ensure energy savings, meet building codes, and require minimal maintenance. These issues affect your ability to run at full capacity and, thus, your bottom line. They're non-negotiable.

For nearly a century, manufacturers have partnered with Acuity Brands to integrate lighting into their operations – lighting that enhances productivity and streamlines their facilities management.

We are a single-source provider of today's most innovative lighting technologies, offering an extensive portfolio of products and services that deliver real results by creating cost-effective, safe and productive manufacturing facilities.

**It's more than energy savings
Acuity Brands offers a number
of options that extend the life
of your lighting solutions while
saving on energy consumption.**

Page 3

>IMAGE<

Page 4

Header –

Your lighting system should be hard at work.

Subhead 1 –

Imagine lighting that doesn't waste expensive resources, take breaks, or require ongoing supervision.

Text –

- Your lighting could minimize the time and money needed to get things done by reducing the resources you spend on installation, maintenance and energy.
- Your lighting should help keep you running in compliance with the latest codes for safety, plus qualify you for efficiency-related rebates and tax incentives, especially when combined with controls.
- Your lighting can reliably and consistently produce superior illumination to support your operations, whatever the task or wherever the location.

A Lighting Reminder

- On average, LED lighting technology can save you 60% in energy costs over traditional lighting technology.
- Better-quality lighting overhead enables safer, more efficient operations on the production floor.
- On multiple fronts, outdated lighting simply can't compete with today's smart lighting and controls.

Subhead 2 –

Our lighting solutions support manufacturing

Acuity Brands is your single-source provider and true partner, delivering industry-leading lighting and controls solutions that simply work amid the challenges of the manufacturing environment. From products and support to specialized services and financing, we're committed to your successful operations.

Page 5

Header –

Expect your lighting to do more for your bottom line.

Subhead –

Benefits of an Optimized Manufacturing Facility

Text 1 –

- **Savings:** Realized through reduced energy use, labor and maintenance.
- **Operational Efficiency:** Achieved through increased productivity, improved safety and reallocated resources.

- **Visual Comfort:** Supports reduced worker fatigue and higher, more consistent production.
- **Flexibility:** Components provide control over your lighting environment with tools that evolve as your operation does.

Text 2 –

Your manufacturing lighting can give you many years of flexible, efficient lighting that will pay for itself quickly. Optimization starts with advanced LED luminaires that save energy and minimize maintenance. The more you invest, the more benefits you realize for reducing your total costs.

Customize your system to your specific application and maximize your returns.

In the renovation example below, we replace pulse-start metal halide luminaires in a typical manufacturing application (bottom of chart) with I-BEAM® IBL LED high bay luminaires — and then build up to your optimized solution.

Page 6

Header –

A range of options for warehouse optimization

Text –

Lithonia Lighting® I-BEAM® IBH LED High Bay

For even the tightest warehouse-lighting budget, the I-BEAM® IBH LED luminaire gives you a very reliable LED solution.

- Saves up to 60% in energy costs over HID
- Costs less to operate than popular fluorescent products
- Pairs with occupancy sensors, dimming and intuitive controls for additional savings

S

Acuity Controls LSXR Sensor

The LSXR passive-infrared occupancy sensor allows you to reconfigure lenses in the field to best adapt the sensor to its location.

- Brings flexibility and convenience to high- and low-mount applications
- Provides four lenses to specifically meet the space requirements

S & OE

Acuity Controls XPoint Wireless XPW

XPoint Wireless gives you superior lighting-management capabilities through wireless communication between fixtures, sensors and wall stations, facility-wide.

- Customize individual fixtures or lighting zones according to changes in production schedules, time of day, seasons or special projects
- Ideal for new or reconfigurable industrial spaces or retrofit projects
- Digitally controls lighting where and when you need it to save on energy

S & F & OE

Pages 7-8

>IMAGE<

Page 9

Text –

Sunoptics® Signature Series Skylight

Sunoptics skylights flood your warehouse with the maximum amount of natural light at a glare-free, 100% level of diffusion.

- Provides visually comfortable lighting that encourages productivity
- Replaces electric lighting for up to 80% of daylight hours
- Gives you 35% or more light transmission than competitive skylights

S

Lithonia Lighting® Quantum® LHQM LED Emergency/Exit Combo

This space-maximizing combination exit-sign and emergency-lighting unit is ideal for above-the-door and other tight-fit applications.

- High-performance solution is reliable, efficient and durable
- Patented Quick-Mount feature makes installation a snap
- Can be outfitted with self-diagnostic, wireless monitoring and reporting options

F & OE

RELOC® Modular Wiring

RELOC is a modular, plug-n-play wiring solution for up to 75% savings on labor compared with traditional hardwiring of luminaires and controls.

- Offers lowest total cost of ownership and the greatest flexibility for lighting/controls wiring
- Minimize installation time and adapts easily to changes at any time during the life of the facility

F & S

Page 10

Header –

Control your lighting to the extreme with XPoint™ Wireless technology

Text –

There's a lot more you can do to control your lighting costs. Consider the incredibly flexible XPoint™ Wireless lighting-control system.

Control individual fixtures – or fixtures within specified zones – to accommodate any production-lighting needs with precision. At the same time, analyze lighting throughout your entire facility and make critical changes where necessary – without rewiring.

- Responsiveness is key: Individual or groups of fixtures respond to multiple signals such as occupancy sensing, daylighting or wall switching, or can perform to automatic scheduling.
- All industrial lighting supported: This versatile system works with all lighting sources: fluorescent, HID, induction or LED.
- New technology = peace of mind: With no central control device, there's no single point of failure. A gateway supports as many as 250 wireless devices and our exclusive Unity GX2 software helps you manage the entire system.
- Data, data and more data: XPoint's gateway can monitor performance, diagnose problems and analyze the entire lighting system. It's simply an unprecedented, intelligent level of control.

Page 11

Food Processing Task Lighting

In addition to traditional industrial lighting, we have task lighting solutions for employee workstations, storage areas, or other areas that need a low-profile solution.

- Lithonia Lighting® Z Series LED Striplights provide superior performance and longer life than fluorescent striplights; no lamp outages mean uniform light and reduced maintenance costs.
- Lithonia Lighting® MS Series LED Industrial Striplights provide high light levels often required for critical tasks, such as inspection and packing, while reducing the overall glare.

Office Lighting

Like our industrial lighting portfolio, our office lighting solutions give your adjoining new, renovated or retrofit office space increased energy savings, user comfort and quality of light.

- Lithonia Lighting® FS Series Recessed LED Luminaire breaks down cost barriers; its long life helps reduce maintenance time and costs, enhancing overall value.
- Lithonia Lighting® VT Series LED RELIGHT Assembly Kit is an ideal solution for replacing existing fluorescent troffer and parabolic systems.

Outdoor Lighting

Save money and energy while you enhance the security of your property with optimal outdoor lighting and control solutions.

- Lithonia Lighting® D Series LED Area Luminaires deliver performance, long life, energy savings, aesthetics and better lighting from every angle.
- Lithonia Lighting® High-Lumen Floods offer exceptional energy savings over traditional HID luminaires and long service life (up to 20 years of nighttime use); ideal for high mounting applications.

Back cover – PICK UP

3. TRADE SHOW/EVENTS PLANNING DOCUMENT

Client: Acuity Brands

For the first time, leading lighting manufacturer Acuity Brands, Inc., was determined to measure the success of its presence at the more than two dozen trade shows and events it attends each year.

The following is a plan I wrote working with the head of Corporate Trade Shows/Events outlining the new strategy, his related KPIs, and how he expected the initiative to benefit the company if he received the proper level of buy-in and support from company management.

Corporate Events and Trade Show Marketing FY15 STRATEGIC PLAN

EXECUTIVE SUMMARY

The following is a plan to drive more accountability into our corporate event and trade show marketing by maximizing the value of each opportunity in ways that ultimately lead to increased sales. We will focus on producing consistent, strategic programs around our events and trade shows, programs that cultivate best practices tied to reaching measurable criteria. Buy-in from all those involved in event and trade show activities will be critical to achieving our goals, so all efforts will be made to standardize program elements and streamline processes. In the end, we expect to approach each event-marketing opportunity with a specific strategy for maximizing our gain.

SITUATION

Historically, the decision to exhibit Acuity Brands lighting and control solutions at corporate-sponsored events and industry trade shows has been based primarily on what has been done for each event in years past and/or based on a request from our internal and external sellers. We have used largely anecdotal evidence to justify these expenditures without an agreed-upon metric based on pre-, during- and post-show marketing communication efforts or the ability to tie an event back to a sale or a potential sales opportunity.

To provide greater accountability for these activities – to turn qualitative measures of marketing success into more quantifiable measures – we plan to base decisions about exhibiting on each event’s value as determined by the return on objectives (ROO) and/or the return on investment (ROI) it provides as part of our overall marketing strategy. For the latter, we’ll use specific, industry-wide measurements, those generally tied to increased revenue, saved expenses, or both. Going forward, we will adjust our level of commitment (e.g., size of booth, amount of event-related promotion, size of booth staff, etc.) and marketing involvement (e.g., brand participation, messaging, product selection, etc.) based on their estimated value.

At the same time, we plan to create event and trade show marketing communications programs that incorporate the direction the company is taking to become more vertically aligned with a stronger, customer-driven focus on solution selling.

GOAL

Provide greater accountability to Acuity Brands event and trade show marketing activities.

OBJECTIVE

Base level of event and trade show participation on ROO/ROI data.

STRATEGIES

1. STRATEGY: Provide marketing and logistics support to ongoing events

While implementing the new direction for corporate events and trade shows, it is critical that events already scheduled are well-managed and not allowed to slip through the cracks created by anticipated changes. Maintaining the current momentum – and, where possible, elevating the scheduled events toward the new vision – requires a staff dedicated to getting things done on time and on budget while meeting or exceeding other internal and/or external customer expectations. At the same time, the staff must have the ability to seamlessly transition toward the performance expectations of the impending departmental changes.

TACTICS / TOOLS

- Staff the department with employees who demonstrate specific experience, skills and competencies for seamlessly executing current event-marketing programs, and for taking Acuity Brands event and trade show marketing activities to the next level.
- Develop a method for transferring knowledge from existing staff to new staff to make the transition as easily manageable as possible.
- Conduct training session(s) for new staff members on all departmental strategies tied to our ROI objectives.
- Work closely with the staff to develop standard work around event-marketing activities.
- Drive continuous improvement toward achieving a successful execution of this Plan.

2. STRATEGY: Centralize all event and trade show activities, company-wide

Currently, several disparate groups throughout Acuity Brands coordinate their own event-marketing efforts. They have historically remained independent of resources at the corporate level, inadvertently creating challenges for across-the-board consistency of branding and messaging. One recent example: the Sunoptics booth at LIGHTFAIR® 2014; this year's low attendance demonstrated the tendency to get off strategy for events being managed independently.

We want to connect with these individuals so they rally around our strategy for one dedicated entity, and take advantage of and participate in the new structure behind our corporate events and trade show initiatives. This will create a more unified approach to our important event-marketing efforts and ensure that Acuity Brands and its brands are represented at all events in ways that are aligned with corporate objectives. We will draw on lean principles of management to accomplish this.

TACTICS / TOOLS:

- Gather information to identify all event marketing activities that are being done independently of the corporate function.
- Hold Kaizen sessions with those involved in these autonomous events to communicate the importance of the new corporate event and trade-show marketing strategy, and to outline established guidelines and standard work. These Kaizens also would be used to overcome resistance to the concepts behind this strategy.
- Illustrate the waste currently involved in duplicating efforts, working outside of economies of scale, and not sharing common knowledge and resources, particularly those immersed in solutions selling.
- Conversely, illustrate the efficiencies, capabilities and continuous-improvement opportunities possible by aligning efforts with the new, centralized corporate event and trade show marketing function.
- Create stakeholders within these groups by regularly sharing successes and communicating the value to them behind the overall strategy.

3. STRATEGY: Push adoption of ROO/ROI measurements by Product and Vertical teams, and by internal and external sales groups across the organization.

To maximize our opportunity for success, we plan to communicate to our constituents the importance of determining the actual value of event and trade show opportunities as the means by which we judge our level of participation. Our success for event-marketing efforts depends on buy-in from the Product and Vertical teams, as well as an appreciation for the dynamics behind the strategy from our sales teams.

We'll use elements of basic communications planning to reach these groups with our messages.

TACTICS / TOOLS

- Standard-work definition: Working with others, define and publish the standard work developed for the execution of all events and trade shows. In developing this material, allow input from targeted groups on the methodology up front in order to create appropriate expectations and courses of action for all involved.
- Initial communication: To launch this Plan, conduct a Kaizen session with key decision-makers to explain the full scope of our efforts behind a more strategic approach to event marketing. Include a presentation on the means for collecting ROO/ROI data and input, and how the information will be used going forward.
- Regular correspondence: Send regularly scheduled e-mail updates to target groups, advising them of pending shows and strategies for gathering ROO/ROI data, as well as for using the data to rank shows according to their overall value (measured against each investment).
- Pre-show collaboration: Work closely with Marketing Communications and the Product, Vertical and Channel teams on all event and trade show sponsorships to get a clear direction on the specific messaging for each event-marketing opportunity.
- Organization-wide push: As outlined in Strategy #2, communicate early on with those groups and individuals who work outside of Marketing Communications to do their own events and trade shows so they unite behind our strategy for one dedicated and effectively branded corporate effort.

- Booth staff training: As done for LIGHTFAIR® International 2014, work closely with the Training & Education team to develop critical online-training programs that strengthen the delivery of event-specific brand, solution and product-story messaging.
- Executive management updates: Through general meetings and face-to-face consultation, keep management abreast of how we are building data to create a year (FY15) of results for a year-end evaluation of our event/trade show activities.

4. STRATEGY: Capture ROO/ROI data for corporate events and trade shows

Corporate events and trade shows provide us with opportunities to get closer to the prospective customer than do any other types of marketing activity. This is why metrics are so critical to determining the value we gain from these events. We want to answer such questions as, “Could we invest just a little more here to make a much bigger impact.” “Would backing off our investment for this event bring any less value to us?” “Do we even need to attend this show, or are we doing so simply because we’ve always done so?”

We will use all the internal and external resources we can to collect data and feedback from every event (starting with LIGHTFAIR® International 2014). We will then evaluate the results from each marketing event against industry-standard criteria and our own objectives (ROO) to determine ways to minimize potential waste or to maximize the return on these investments (ROI).

TACTICS / TOOLS

- Develop standard work around all events and trade shows for capturing data and input for use in determining ROO and calculating ROI.
- Create standard documentation to be used for collecting data and input.
- Determine best, established industry standards to be used for recording and calculating collected data and input.
- Create a vehicle for effectively communicating the findings to all stakeholders.

5. STRATEGY: Synthesize data to determine ROI rankings.

Data gathered from surveys as well as input from those who are in direct touch with our customer base are *critical* to shaping all future marketing efforts, particularly the very next event/trade show.

We will synthesize the data and input we collect in order to shape all ongoing efforts.

TACTICS / TOOLS

- Take advantage of proven industry tools as well as internal resources to rank each event’s value. These tools include event-management software, lead-generation tools, survey instruments, etc.
- Use rankings to effect necessary, across-the-board changes in how we approach each corporate event or trade show in terms of our investment of time and treasure. Aspects affected might include:
 - Size of booth

- Level of promotion (before, during and after)
- Number of participants
- Number of products to demonstrate
- Value of booth giveaway(s)

6. STRATEGY: Optimize existing activities and resources.

It's not enough to collect data; the value lies in our ability to apply results for continuous improvement. As such, the data and input collected as part of Strategy #5 will effect change in multiple aspects of our event and trade show marketing efforts. LIGHTFAIR® International 2014 already provided an opportunity to implement some of these changes; they will be improved upon as we continue with the execution of this Plan.

TACTICS / TOOLS

- Lead generation: Develop and maintain a lead-generation program that will add value to our overall sales efforts by helping us increase new-customer opportunities or upsell and/or retain existing customers.
- Product selection: Select and display products for each event or trade show based on specific marketing/messaging objectives.
- Displays: Shore up the effectiveness behind each physical Acuity Brands event/trade show exhibit in terms of the customer experience (demonstrations, booth narratives, selected floor location, etc.).
- Staffing: Develop and maintain a more effective means by which we select booth staff and conduct pre-show training.
- Brand awareness: Work with Marketing Communications to develop branding opportunities (show sponsorships, corporate Internet presence, promotional items, etc.) that maximize the quantity and quality of our impressions at each event.
- Marketing/advertising/PR: Work with Corporate Communications to maximize our marketing, advertising and PR opportunities from each event (direct mail, meeting schedules, media placements, press briefings, perception/attitude measures, attendance recall, brand preference, etc.)
- Voice of Customer: Optimize our method for capturing VOC by using events and trade shows as types of focus groups, asking such questions as:
 - Why did they stop?
 - What is the feedback on our products?
 - What is the feedback on our solutions?
 - What is the feedback on our messaging?
 - What concerns do they have?
 - What is their biggest problem?
 - How can we help them?
 - What obstacles do they need to overcome?
 - Whom do they consider as our competition?

TIMELINE

Next 30 days:

- Initiate critical first steps that will create immediate successes toward meeting our ROO/ROI goals.
- Solidify existing event/trade show planning to maintain momentum already established for upcoming events.
- Maximize departmental talent through effective staffing and training.
- Begin development of Standard Work around event and trade show marketing.

Next 90 days (remainder of FY14):

- Continue to build on Standard Work with all available tools, including Kaizens, and with input from socializing internally.
- Refine Standard Work, as needed, based on feedback.
- Continue to investigate corporate event and trade show opportunities for FY15; manage expectations based on event dynamics, particularly new events.
- Communicate with MarCom, Product and Vertical groups to gain agreement on approaches at events based on relevant verticals and their respective products.
- Continue driving company-wide support for ROO/ROI-based event and trade show methodologies; begin monthly communication to relevant groups and periodic communication to management.
- Create and confirm calendar for 2015 corporate events and trade shows, including those managed independently throughout company.

Next 365 days:

- Adjust Standard Work according to initial hits and misses; work toward solidifying processes.
- Begin LFI2015 work (end of Q2); determine deliverables for maximizing show as exemplary ROO/ROI event.
- Continue monthly communications (six months) to promote the ROO/ROI-based event and trade show methodologies to all constituents, company-wide, including Value Steams and Product/Vertical groups.
- Establish criteria for all events and trade shows based on the first year of “exploration” into the ROO/ROI opportunities; continue to optimize all activities and resources.
- Recap year with data-driven results.
- Plan for FY2016.

BUDGET

(Redacted)

4. ARTICLE FOR UNIVERSITY MAGAZINE/WEBSITE

Client: Georgia State University

As a part-time professor of business communication (BCOM) at Georgia State University, I witness first-hand the crisis we face in the business world with regard to students' lack of business etiquette. I pitched this editorial to the school as a way to make at least somewhat of a difference since etiquette is not covered in today's classroom.

Business Etiquette

Here to Stay, So Take Note. Manners never go out of style

By Molly Badgett

Etiquette is such an old-fashioned word, inviting visions of pinky fingers properly perched by porcelain cups, and haberdashery held patiently in chivalrous hands. Of French origin, the word can seem hoity-toity and off-putting. But make no mistake. Despite decades of cultural evolution and ensuing iterations of etiquette defined, its basic premise has not changed. You ignore it at your own peril, especially in the business world.

So what is the basic premise of etiquette?

“For me, it goes beyond the Golden Rule,” says Tony Alessandra (Ph.D. ’76), author and motivational speaker, referring to the 2,000-year-old rule that suggests how we want to be treated should dictate how we treat others.

“I like to add what I call The Platinum Rule, which says, ‘Do unto others as they want to be done unto,’” Alessandra says. “Respecting others means learning to treat different people differently according to their needs, not ours. This leads to greater understanding and acceptance all around.”

It’s a fine point, but because the workforce is more ethnically diverse than ever and encompasses, for the first time in history, four generations of employees (the Matures, Baby Boomers, Generation X and Generation Y), it’s an important one. It implies an opportunity to learn about others, and to condition ourselves to care about what motivates each person with whom we interact.

According to Beverly Langford, clinical assistant professor of graduate-level management communication at GSU’s J. Mack Robinson College of Business, that caring must be genuine to be effective.

“When we extend genuine courtesy to others, they respond positively to us,” says Langford, author of *The Etiquette Edge: The Unspoken Rules for Business Success*. “Having people respond positively to us is a great confidence booster. In turn, as we become more secure about ourselves, we become increasingly comfortable treating others well, and courtesy becomes an integral element of our character.”

It doesn’t hurt, however, to give students a jumpstart by building courtesy into their curriculum.

The Department of Marketing’s Business Communications program, which Langford directs, lets students showcase their grasp of do’s and don’ts for specific business scenarios in class presentations. The BCOM 3950 class covers topics such as shared workspaces, manager-employee communication, corporate meetings and events, innate differences between co-workers, and the use of electronic devices.

The course, which also focuses on professional development, would win high marks from high-profile executives at companies such as The Coca-Cola Company, IBM, Procter & Gamble, Georgia Power and Kimberly Clark, to name a few. In a 2007 departmental study on workplace communication, these executives were among the many

who placed social interaction – business etiquette, professional behavior, conduct in social situations and building relationships – as schools’ most important area of instruction for business communication.

These same executives said companies are putting a greater emphasis on relationships and the behavioral nuances that maintain them. The message: Workplace decorum is a growing concern, not a waning one.

Modern-day issues

Ironically, the emphasis on relationships comes just as employees, particularly new ones, interact less through face-to-face or voice communication and rely more on electronic devices. Socially speaking, that’s destructive. At best, electronic communication limits input, obscures context, distorts feedback and allows distractions. At worst, it eliminates critical body language, creating a void for the recipient to fill, usually in a negative way, according to research by renowned body language expert Patti Wood.

In her work, Wood has witnessed all kinds of negative-filled voids in communication.

Before speaking to a group of M.B.A. students about a year ago, she shook hands with many of the students attending the event. During her speech, however, things went differently. As she approached one audience member, expecting to engage her in a simple, instructional handshake exercise, the student curled her nose, puckered her mouth, recoiled and announced, “I don’t shake hands.”

“That may sound like exceptional story,” Wood says, “however, the human resource executives and small business owners I consult with on interviewing methods say they now have many job applicants who refuse to shake hands.”

Debbie Rodkin (M.B.A. ’00), executive director of RE:FOCUS on Careers, a local networking group, says that, barring any religious or immediate health issues, such behavior is, at the very least, odd.

“The No. 1 rule in business etiquette is to make the other person feel worthwhile,” Rodkin says. “Be professional. Be genuine. Be interested in other people. Remember, it’s not only about you.”

Margaret Matthews, director of development at GSU’s Byrdine F. Lewis School of Nursing and Health Professions, agrees. In her role, personal presentation is of utmost importance. That means, among other things, showing respect toward others by wearing proper business attire and dining with good manners. Unfortunately, she says, given the business-casual workplace, those traditions seem to be losing significant ground.

“I don’t care how old you are, manners never go out of style,” Matthews says. “If you know them, they give you confidence.”

Matthews stresses two important points regarding personal appearance. One, dressing well doesn’t mean spending a lot of money; rather, it means putting together what you have in a professional way. And, regardless of your rebellious nature, understand that the culture you’re targeting sets the tone for your attire. In other words, if you’re trying to land a job for a conservative Fortune 500 firm, don’t expect your new tattoo to win over the hiring manager.

Getting – and staying – hired

Christa “CiCi” Pierce (B.A. ’10) says her approach to business etiquette, particularly when getting to know a suitor in an employment relationship, is to assume company managers are quietly, strategically testing you. She’s still being courted by one of the most attractive of employers, Google. One night, Google invited her to a social event.

“They had a layout of food and alcohol; a lot of the younger applicants went for everything but I didn’t do it,” Pierce says. “I don’t drink alcohol in front of recruiters. I feel like it’s a test; it feels like they’re taking notes.”

Whether Google’s recruiters actually welcomed Pierce to the bar or not, the company that personifies the unconventional workplace at least knows now that Pierce can swim against the mainstream. It’s that kind of personal constitution that can make business etiquette a breeze for some to master.

Terrance Rogers (B.B.A. ’10), who headed to work for a New York investment bank shortly after he graduated, also knows how to tailor his behavior to suit the environment. For him, it was a matter of bridging regional language differences.

“In the South, I was used to saying, ‘sir’ and ‘ma’am,’” Rogers says. “But in the Northeast, it can come off as making a statement about someone’s age. They prefer the first name and tell me, ‘I’m not your grandmother.’ I’m learning how to switch. Addressing them how they’d like to be addressed is giving them respect.”

Rogers is the kind of employee that Ben Loggins (M.B.A. ’75) would likely hire in a heartbeat for his CPA firm, if only for Rogers’ attentiveness toward others’ needs. That humility, that ability to place one’s self in another’s shoes, is the very foundation of etiquette, personal or professional.

It might very well be the foundation, too, for staying hired in today’s economy. For small-business owners like Loggins, with clients to please and deadlines to meet, now is not the time for employees to be asking, “What’s in it for me?”

“Employees must conform to the needs of the company,” Loggins says. “They can’t focus on the minimum they can do to get by.” If you’re a job candidate who, for example, tends to focus on the salary and benefits of a position before you’ve considered the skills you bring to match the requirements of the job, he says, you might consider adjusting the way you look at this particular business relationship.

Is that a question of business etiquette, or a matter of simple work habits? For Elizabeth Robertson (M.B.A. ’11), it’s all in how you define it. For her, etiquette involves “interpretation as to what your actions mean to others.” “It’s your everyday experiences on site,” Robertson says. “It’s what behaviors are okay and what behaviors are not okay.”

Having studied organizational effectiveness, Robertson is aware of many other dynamics that shape today’s work environments, both internally and externally. One that has changed over the past several decades is the manner in which we give or accept praise or criticism. Social mores now suggest we be just as mindful of those who shy from public praise as we are of those who, more understandably, balk even at private criticism.

“It’s important not only to provide praise, but to provide it in a face-to-face conversation,” Robertson says. “Face-to-face is powerful, and the other person will respect you more.”

As for criticism, remember that each employee, deep down, really does want to know where he or she stands. The keys, however, are to focus on the issue, not the person, and to provide possible alternatives to the action under scrutiny.

“When it comes to critiquing others, you don’t want to be seen as a complainer. Offer a solution,” Robertson says. “Say, ‘Here’s what is not going well, here are some problems.’ Then ask, ‘What are we going to do about it? If we do X, this might be better.’ Be proactive.”

No doubt, honing business etiquette skills takes time and discipline, both in gaining understanding and in implementing what is learned. The upshot is that these skills, themselves, are marketable. That’s especially important in today’s economy, whether you’re heading into the workforce or are already there.

“Failing to recognize how you can seize a competitive advantage by leveraging good manners and courtesy in the workplace can undermine your good efforts on the job,” says Langford.

“Don’t assume that just doing a good job will get you noticed,” Langford adds. “In today’s highly competitive, information-overloaded, speed-of-light environment, reluctance to make sure that you get the right kind of attention can be damaging in the long run and rob you of the opportunity to reap the recognition and the rewards that you deserve.”

Molly A. Badgett, APR (M.B.A. '04) is a freelance writer and marketing communications consultant, and a part-time instructor of Business Communications at Georgia State. She is based in Atlanta.

5. CRISIS COMMUNICATIONS – EDITORIAL

Client: Cobb County Commission Chairman Tim Lee

The following column was written on behalf of Cobb County Commission Chairman Tim Lee in response to opponents' complaints regarding the way Lee handled the very controversial decision by the Atlanta Braves to move from downtown Atlanta to neighboring Cobb County. Some say the way the move was handled illustrated illegal activities by Cobb's government to attract the team.

My liaison with Lee – my direct client – requested that the column explain to readers how difficult it is to govern with all the parameters placed upon public officials (for open meetings, quorums for those meetings, other means of transparency, etc.).

Defying my client's specific request, given my instincts as a former journalist, I instead turned the column into something more palatable for readers because I felt what was being requested would be viewed as, in effect, a license to complain about the very nature of what makes government work for constituents. Striking the right balance was difficult, but this column won Lee many favorable comments from citizens and from other county chairpersons throughout the state.

Tim Lee column/BrightSide
April 23, 2014
Draft One – M. Badgett

Government Runs Differently, for Better or for Worse

Many people lament the fact that government doesn't run like business. It's an easy and often called-for complaint, given what appears to be inefficiency in the public sector.

Actions advance slowly in government, and they require paper or electronic trails that challenge our effectiveness. They also are subject to policies that would stifle even the most creative of companies.

The fact is, for those of us in the public sector to act more like managers in the private sector would be a license to run amok. And while we make decisions that many might not agree with, we don't do so in a managerial vacuum. We don't make them without the constant reminder of the public trust we've been given.

We do have the public to answer to, and the public has never had so many communication outlets for making its approval or disapproval known. That, alone, is humbling.

Like decisions made in any business, the best government decisions focus on progress and future viability. And, as for any business leader, there are key factors for your elected officials to consider when we cast our votes: external competition, meeting demand and supply, and the weight of certain risks. So, in reality, governments are faced with very business-like decisions.

In Cobb County, we have a track record of efficiency and effectiveness – a record many private-sector organizations would envy. We have a sustainable budget with a surplus and a strong rainy-day fund. We have one of the lowest sales-tax rates in the state. And, we have one of the lowest property-tax millage rates in the Atlanta metro area.

The way government operates might mystify or even surprise many, but it's obvious in Cobb County that decision-making reflects a local government committed to maintaining a high quality of life for its 700,000 residents.

We make our decisions to maintain economic viability. We cast our votes to ensure we have competitive products and services. Despite the many obstacles inherent in government decision-making, we still work to best represent you, in a very real sense, our shareholders.

6. ARTICLE FOR PROFESSIONAL TRADE MAGAZINE/WEBSITE

Client: CoreNet Global, Inc.

This article was written in response to a study that could possibly influence the work of CoreNet Global members, nearly 10,000 corporate real estate professionals throughout the world.

Office Temperatures: Getting Closer to Pleasing *Almost* Everyone

by Molly A. Badgett

Earlier this year, Dutch scientists elicited resounding “I told you so’s” from women the world over after releasing their findings on office workers’ metabolic rates and the standards used to set indoor temperatures. That’s because the study suggested that today’s temperature settings are outdated, based on 1960s data from just one, 40-year-old, 154-lb./70-kg. male who was used then to represent the average office employee.

The findings came from biophysicists Boris Kingma and Wouter van Marken Lichtenbelt of Maastricht University in the Netherlands and were published late summer in the journal *Nature Climate Change*.

“If you really want to represent the entire population, you must look at men *and* women,” Kingma told *the LEADER*. “And it’s not just a matter of their clothing, but a matter of the variation in their metabolic rates. That was the point of our research.”

In the study, the scientists suggested that age and ageing, body size and composition, health, and the type of work performed also should play a role in setting indoor-temperature standards. Currently, standards mean that temperature settings largely favor men.

It’s not a surprise to many women.

“I can speak from personal experience,” said Ashley Rigby, education specialist with Herman Miller in New York, where most of the employees in the 17,000-square-foot showroom are women, and where the thermostat, set at 73 degrees, is under control of building management.

“The majority of the time, everyone in my office is cold. We have a little storage locker and, regardless of the season, we have some sort of sweater or jacket that we’ll take out as necessary. Even in the summer months, everyone has some sort of sweater on.”

But ergonomic design is central to the company’s value proposition and Rigby appreciates other creature comforts the showroom has to offer. “Luckily, we work for a furniture manufacturer; we work in an ergonomically designed showroom. We probably have more comfort and more choice than most,” she said. “So, we don’t have too much to complain about.”

Futile Exercise? Not for Long.

As director of facilities/RWS and director of sustainability/HQ for Oracle, George Denise knows in an imperfect world, you can’t please all the people all the time with ideal office temperatures.

“It’s an assumption that we have good control over the temperature in the building,” Denise said. “The newer the building and the more high-end the building, that’s probably true. But we’ve only been developing these systems in the past 50 to 60 years. But, what works perfectly that we make?”

Currently for most existing buildings, cooling a single corner office with incoming sunshine down to 78 degrees might involve turning the air conditioning up so high that a coworker across the hall must suffer in 68 degrees, Denise said. Similarly, employees who bring space heaters into the office to warm individual cubicles might defeat their purpose. Said Denise, “It’s going to warm up that office and make the building blow more cold air.”

In both scenarios, energy waste is the real, unintended consequence. The solution? Controlling temperatures on a zone-to-zone basis for as few as, say, four workstations at a time.

Getting us there is innovation such as variable-air-volume (VAV) systems that physically modulate the amount of air put into a small(er) space, and direct-digital-control (DDC) technology, which gives individual users hyper-

It’s a fact unlikely to garner much argument: Generally speaking, men and women have different preferences for office temperatures. According to years of multiple surveys, men like ambient temperatures in the low 70s of the Fahrenheit scale (around 22°C) while women prefer temperatures in the middle to upper 70s (around 25°C).

local control over temperatures through control of the air volume. Smart as they are, some DDCs can even learn and adjust over time to the pattern of settings “voted on” by users within each zone.

Moves Away from HVAC

While innovation is valuable, nature is priceless, and Denise notes another trend – one toward operable windows that allow for naturally ventilated buildings. After all, in over half of the United States and half of the time, he said, the air outside is a temperature that’s would be “just fine” for an office environment.

Groups like the The American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE) and the Center for the Built Environment (CBE) at University of California Berkeley have studied the relationship between operable windows and building occupants’ comfort for years.

In a 2004 study, ASHRAE suggests allowing office workers to open windows for natural ventilation actually creates a greater *sense* of comfort if for no other reason than the direct control it gives to employees over their environment. The CBE currently is conducting research on natural ventilation in commercial buildings throughout California.

If allowing for an open window here or there isn’t customization enough, the CBE has another idea for personalizing the temperature of individual space. It’s called the Personal Comfort System, which is an academic term for a desk chair that heats up or cools down at the touch of a button or two.

“People can adjust their chair to the temperature where they are the most comfortable, and the energy is cut in half,” Denise said. “The temperature in the space becomes much less critical because the chair takes care of it for the individual.”

Rigby’s employer, Herman Miller, takes another approach. It focuses primarily on a chair’s breathability, aiming for a “neutral thermal effect” that allows for greater air flow to the body, plus the dispersion of moisture and heat away from the body.

For someone like Rigby, either chair solution would be welcomed, and not just because she has a heightened appreciation for ergonomics, thermal or otherwise. Instead, the chair innovations would be a matter of personal freedom and work productivity.

“At 6 at night, the air conditioning turns off and really prevents me from working late,” Rigby said, adding that Herman Miller makes arrangements with its building management to provide air conditioning (for a fee) during after-hour customer events. “But by 6:30, it gets too warm. I wish my schedule could be on my terms, not the building temperature telling me what to do.”

7. CREATIVE BRIEF FOR LIGHTING DISPLAY ROOM

Client: Acuity Brands, Inc.

Leading lighting manufacturer Acuity Brands is on the forefront of digital lighting technology. As such, the company needed to update a section of its Center for Light & Space in Conyers, Georgia, to showcase the integrative nature of all its digital capabilities.

Working with the head of marketing for the company's commercial indoor lighting group, I wrote this creative brief following a tour of the facility and an explanation of what he envisioned. The key was to ensure key messaging was incorporated into a visitor's experience of the Center.

Creative Brief

Project summary:

Build out the Digital Lighting Experience Room at the Center for Light & Space through the use of multiple vignettes, or scenes, that portray – as authentically as possible – various applications in which Acuity’s integrated lighting, lighting-control and technology products are successfully installed. Room size is approximately 20’ x 30’ with a 10’ grid ceiling, one entrance door, a simulated bank of windows, and a presentation panel (see drawing).

Goal:

Provide users a series of detail-specific environments they can engage in as a way to learn about and actually experience Acuity’s digital integrated lighting, lighting-control and technology products.

Overall messages:

1. Acuity’s “Smart + Simple” approach to integrated lighting, lighting controls and embedded smart technology means whether in one room or multiple rooms, and over a vast array of applications, digital technology is responsive to specific demands and integrates seamlessly with a controls platform that allows you to manage your lighting assets for significant energy savings. The technology also creates viability far into the future, thanks to built-in flexibility, guaranteed system compatibility across product lines, and a continued focus on customers’ ongoing need to build on positive outcomes.
2. As assets, high-quality digital lighting can contribute positively to your organization’s efficiency and productivity. Because it comes in direct contact with your target audiences and affects their experience in your space, it also can contribute positively to your brand.

Overall room set-up:

As a whole, the room should present multiple environments for the multiple lighting applications as seamlessly as possible, and without overwhelming the technology on display. Around the room, each scene should provide the illusion of distance, using theatrical perspectives to create far horizons. As much as possible, each scene should tie in with its two adjacent scenes and any transitional element to create visual continuity. In the center of the room, chairs will be swivel chairs to allow for easy viewing of the entire room.

USERS:

Internal: Presenter(s)



External: Lighting designers
 Lighting architects/engineers
 Lighting specifiers
 Property owners/managers
 Contractors
 Facility and maintenance personnel

SCENES:

Scene 1: Relighting exhibit

Display: Front of room, left of presentation screen: cutaways of actual retrofit kit and their related products.

Purpose: Demonstrate the ease of retrofitting solutions.

Message(s): Retrofitting existing lighting with digital lighting is a Smart + Simple way to realize energy savings and more control over your lighting. Acuity Brands provides the products for easy upgrading without having to break the ceiling plane, plus sophisticated control capabilities that are easy to install and use.

Scenes 2a/b: Retail space, with added changing room

Display: Flat wall area showing typical retail space that uses recessed volumetric lighting, and the inside of a changing room in upscale retail-clothing space, looking outward. Mounted to the wall is a controller that will be used to change the color of the overhead lighting in the changing room.

Purposes: 1. Retail space: Show how lighting fits into these applications and state the benefits of the technology, plus the advantage of RELOC.
 2. Changing room: Demonstrate new tunable-lighting technology that allows the user who's changing clothes to change the color of the light above so that the color of merchandise can be seen in different simulated environments.

Message(s): As much as other areas of the retail space are designed to sell, a changing room's "job" is to sell clothing. A retailer can experience more sales with better lighting, including changing-room lighting that features the new eldoLED driver. Upon command, it works with the light engine to depict lighting in different environments (home, office, outdoors, low-lit restaurant, etc.).

Transition: Doors to room; make appear as doors to stockroom (as viewed from adjacent settings)

Scene 3: Healthcare setting

Display: Corner area for reception desk/nurses' station of a hospital, including a bit of hallway. Tie in with the "stockroom doors" at right and stairwell to left.

Purpose: Demonstrate critical nature of proper lighting controls, particularly *dim-to-light* capabilities.

Message(s): With controls seamlessly integrated, Acuity Brands is responsive lighting where and when responsiveness is critical. Also, exceptional lighting controls help save money while maintaining safety. For example, at night when lights on a hospital ward are low, quick illumination (as much as 60%) of the area is critical if a patient were to leave his or her room and enter the hallway.

Scene 4: Stairwell

- Display: Flat wall showing cross-section or straight-on view of stairs going up wall. Incorporate way to indicate where a person might be on the stairwell at any given time. Consider adjacent healthcare and office-space settings for the positioning/direction of steps.
- Purpose: Demonstrate how lighting can be set to precision-dimming capabilities in order to respond on a strictly as-needed basis based on whereabouts of someone passing an occupancy sensor. As occupant moves floor-to-floor the lighting above or below that floor will illuminate, providing a feeling of safety and security while reducing energy costs when unoccupied.
- Message(s): Similar messages to healthcare scene, but with additional story of the lighting going successively from dim to light and back to dim as occupant moves within the space.

Scene 5: Office space

- Display: Corner area for open-office (and possibly hallway) visual, including cubicle(s). Incorporate half of window display (shared with education vignette) and perhaps the stairwell to the other side.
- Purpose: Show the positive difference that high-quality lighting – such as lighting with less *flicker* – can make in the work environment. Also, demonstrate the incorporation of different types of lighting controls with office lighting, particularly smooth dimming.
- Message(s): Quality lighting creates a better, healthier environment for employees, and that can create greater productivity, higher-quality work products, and less absenteeism.
- Transition: Windows of office and classroom space; represents sidelight daylighting. NOTE: the window closest to the front of the room will be removed.

Scene 6: Classroom

- Display: Flat wall showing classroom elements, including two windows (one shared with Scene 5). The toplight daylighting fixture(s) also should be worked into this display.
- Purpose: Demonstrate the incorporation of daylight harvesting, with both side- and top-lighting, in the educational environment.
- Message(s): Daylighting provides a superb environment for education and studies show that it can result in higher test scores by students who are more open to learning.

Scene 7: Controls exhibit

- Display: Corner area to right of presentation screen, showing actual nLight lighting-control equipment and a monitor to use in showing how one accesses lighting data for management and maintenance purposes.
- Purpose: Showcase wide array of nLight control products and how they're tied into the lighting products throughout the room.
- Message(s): "Smart + Simple" is all about the easy integration of digital lighting with digital lighting-control products and how, together, they provide unprecedented connectivity, portability and functionality.

8. eGUIDE ARTICLE/WEBSITE COPY

Client: Acuity Brands, Inc.

This is another of the many multi-purpose documents I've written for Acuity Brands during the 11 years that I've worked as a consultant with the company, which is one of the world's leading manufacturers of lighting and other building-related technologies.

Technologies Help Guard Grocers Against Today's Challenges

Grocers now find it's their turn in the hot seat of business disruption.

Consumer preference is shifting in large measure to organic, fresh products and ready-made meals. In the U.S., grocery brands from Europe are taking on established domestic chains. Pressure is building against prices. Saving energy has become a mandate for the local store image as well as for the ledger sheet. And, as with all retail, technology – namely, online shopping – threatens to change the face of “going grocery shopping” for millions of consumers.

Competing in this environment isn't for the faint of heart. Already, grocers are in a constant struggle to lower operational costs and increase per-square-foot sales with a product mix renowned for its low margins.

Fortunately, a number of technologies also exist to place the odds squarely in the physical grocer's favor. Conveniently enough, grocers can find multiple solutions to many of these challenges simply by looking up to one primary asset – their store lighting.

Technologies on your side

LED lighting has, by now, been widely recognized for its ability to save energy – as much as 50% to 80%, or more. Grocers who were early adopters of LED lighting for aisles, refrigerated and freezer spaces, office areas and parking lots have long past moved from single, test-market stores to deploying LED lighting strategies enterprise-wide in relatively rapid and well-received transitions.

Grocers who have yet to undergo these changes can look forward to significantly reducing their own operating (and maintenance) costs, and even increasing customer satisfaction by introducing bright, crisp LED lighting that is uniquely better suited to grocery store spaces than is traditional lighting.

But that's not even the half of it.

LED lighting also brings to physical grocers a technology called *indoor-positioning system*, or IPS, that allows them to engage and influence shoppers while maximizing operational efficiencies in other ways.

Similar to GPS, or global positioning system, in the outside environment, IPS works by way of transmitters, or beacons, integrated into the LED lighting system, plus digital mapping of the coverage area, a smart phone or tablet outfitted with a camera and/or Bluetooth® technology, and an opt-in user app.

IPS in Action

Connecting to mobile devices through Bluetooth®, these indoor-positioning beacons facilitate a number of in-store functions for grocery store managers, employees and shoppers alike – that simply can't be imitated in any other shopping platform.

- With “just in time” assistance, store employees can tend to a customer in a crisis or help a customer locate an item. Conversely, customers can ask for help immediately.
- IPS can be used to feed product or store information to all employees or between store employees as a way to increase service levels.
- Working from a desktop or mobile device, a store manager can optimize employee coverage patterns to maximize service effectiveness at any given time.
- Using IPS technology, grocers can experiment with different sales strategies, such as “buy online/pick up in store” (or BOPIS).
- IPS allows store employees to interact with customers beyond the check-out counter but, rather, when customers are making purchasing decisions.
- IPS technology can provide superior data about in-store consumer behavior, such as the number of store visitors at any given time, how long shoppers dwell in a particular department or aisle, the number of departments shopped per store visit, the length of time a shopper spends at any given stand or end case, the number of customers assisted within a given timeframe, sales figures tied to customers' in-app purchases, and even real-time inventory counts.

IPS Also Pays for Itself

The continuous return on investment that is the promise of IPS technology is, by itself, worth pursuing this game-changing technology. Still, there are other advantages:

- No extra labor, hardware or maintenance – not even batteries – is needed to support IPS technology, so ongoing costs are minimized.
- IPS-enabled LED luminaires deliver significant energy savings and can qualify for government tax incentives, thus providing an attractive payback for grocers.
- Data gleaned from IPS technology can be of great market value to grocers who seek to create loyalty through old-fashioned, face-to-face interactions as well as newer marketing channels.
- IPS-enhanced, on-site access to shoppers can give brick-and-mortar grocers a boost in merchandising revenue.

- Lighting-based IPS “future proofs” infrastructure, meaning lighting retrofits can be easily updated over the long life of a system.

Not Yet Convinced?

Take a look, again, at today’s challenges in the grocery business.

As a lighting source, LED provides significant points to grocers for being “green,” and it gives consumers a more inviting place to shop for those new product offerings. It helps grocers compete by reducing the bottom line for lighting and maintenance, thus minimizing the sting of growing competition and shrinking margins.

As a sensory network, LED provides a unique opportunity to engage with consumers where they exist and in ways that no other shopping platform – with online being the least of them – can imitate.

No one technology will meet *all* the needs of the grocery sector. But few technologies have singularly addressed so many challenges faced by grocers and other retailers as those tied to LED lighting. Whether it’s an all-at-once, one-time installation or a lighting retrofit, a long-term investment behind an upgrade to LED lighting is a remarkably sound one.

9. EXECUTIVE SPEECH WRITING

Client: Chief Strategy Officer for Xerox, Inc.

Several years ago, long-time technology leader Xerox changed its business model – *to survive*. This speech was written for Uta Werner, the company’s chief strategy officer, for her keynote address at the Argyle Executive Forum, a membership-based business thinktank for Fortune 1000 companies throughout the world.

DRAFT ONE
Uta Werner Speech
Argyle Executive Forum
Nov. 2, 2011

Good morning, and thank you for that generous welcome.

Just two years ago, we at Xerox did something pretty remarkable. You might have heard about it. We celebrated the very special, 50th birthday anniversary of the legendary Xerox 914 office copier.

It was the world's first automated, plain-paper commercial copier, weighing in at a healthy, 648 pounds. That machine is still a celebrity today, making cameo appearances on historical-reference television shows, and greeting visitors at a museum in the Smithsonian.

When it came on board, the 914 completely transformed a company. Haloid Xerox was well-known and well-regarded as a company in the business of photographic paper and photographic equipment. It also was evolving successfully around a major technology innovation known as *xerography*. In fact, the company had, before, manufactured several other photocopiers using this xerography technology – just none as significant as the 914.

But now, with this exciting new member of its growing family, the company was in a new business – that of *business-document management*. A whole new world of opportunity was opening up for an already-mature company. The company was repositioned. For all intents and purposes, it was re-launched, soaring well above the expectations of those who watched its finances.

But Haloid Xerox, which two years later became known officially and simply as Xerox, wasn't the only company that was transformed by the new venture. So, too, were those companies that used this new Xerox 914 Copier. **They became more efficient. They reduced the time that was spent on work that wasn't strategically relevant. Their staffs were free to focus more closely on their companies' core business.**

In short, Haloid Xerox and the 914, together, had revolutionized the American company's critically important back-office functions. All things are relative, of course, and photocopying, back then, was truly game-changing. These back-office efficiencies meant appreciably improved front-office capabilities.

That is the flagship success story of legacy Xerox, though there have been, of course, many successes over the decades. There have also been a few, you might say, well-documented missteps. But the company that stood at some 2-million-dollars in net income just before putting itself on the business-legends map with the Xerox 914, now counts revenue at **22-billion**.

We also count about 135,000 employees in 160 countries all over the world. We've been honored with the National Medal of Technology – the highest honor

Possible chuckles here from those who know the "real" 2009 story or are fond of the 914's history.

Slow, with emphasis.

an American president can bestow upon a corporation – as one of America’s leading innovators. And, in a bit of irony, success has created for Xerox the long-term burden of repeatedly telling consumers, scholars – and wordsmiths who coin dictionary entries from popular linguistic outliers – that “Xerox” is, in fact, a brand name, not an adjective. Not a verb.

Possible chuckles here.

No doubt, Xerox has changed. We change often, as we are a Fortune 500 company that must respond to the ever-changing needs of, and opportunities within, the marketplace in order to hold our place. As with many companies, perhaps our most consistent challenge lies in aligning public perception with just how much we change, and in what ways.

But, our focus – indeed, one of our core values – is to keep building the Xerox brand, globally, through technology, through innovation. That does not change.

In 2010, we spent more than three-quarters of a billion dollars – three-and-a-half percent of our annual revenues – on research, development and engineering. That percentage, often slightly more, is a typical annual spend for Xerox RD&E. We move forward with product and service *introductions*, as evidenced by the nearly 10,000 U.S. patents we hold. And, we move forward with steady product and service *improvements*, even those that might render existing products and services pointless.

We are consistent and aggressive, but we are not alone in the area of innovation.

According to the 2011 survey of CEOs worldwide by PricewaterhouseCoopers, innovation in products and services ranked right along with increased share of existing markets as a top business priority for 2011. Granted, the survey was released in January and a lot has happened, or should I say *not* happened, in the economy since then, but the point is clear: *innovation is absolutely imperative to growth.*

Innovation is, of course, the child of necessity. It’s a survival response to the fast-paced and ever-widening introduction and adoption of Internet, mobile, personal computing and related technologies.

At Xerox, our response to this inherent state of our industry is most obvious, to most people, in the consistent unveiling of document-management equipment. Of software and integrated solutions that align with related technology breakthroughs. In the mid-‘90s, we developed far beyond our copier-heavy portfolio and changed our identity to The Document Company. Eventually, we outgrew that identity; I’ll speak more about that in a minute.

To this day, we produce some of the world’s most advanced black-and-white and color, multi-function copiers, printers, fax systems and scanners. These include everything from widely distributed desktop-publishing solutions that can be seen throughout workplaces like yours, to large, high-end DocuTech digital presses for commercial print-production houses.

World-class technology applied against an ever-changing business backdrop is standard for Xerox.

Here, for example, are our solid inks for our ColorQube printer, which creates 90 percent less consumable waste compared to traditional laser devices, and costs 62 percent less in producing color.

Show four solid-ink blocks.

And, speaking of our focus on green technology – and color in general – we’re a leader among companies introducing color to transactional printing, one of the most dynamic segments of high-volume digital printing.

When it comes to product development, we even shoot ourselves in the foot on occasion – and on purpose. The fearless self-cannibalization that I mentioned previously is proof that we know the often-tragic risks of doing things the way they’ve always been done, whether you’re talking about for decades, or, as is the case in our business, a matter of months.

Despite all this, there is still so much more to tell where Xerox technology is concerned – where it has changed and how it is likely to evolve. But let me first continue describing the imperative role of innovation as a means of growth for *all* of us.

As successful companies are drawn to innovate by necessity, they also view innovation as a *push* strategy. They seek to launch goods and services in corners of the world where new markets are emerging, markets that don’t look or behave, culturally, like the ones they last dealt with. These markets are, however, eager and newly accessible. Their appetite for doing business with established, global companies is insatiable.

In fact, most CEOs you meet today would agree they are anticipating immediate, measurable growth in Asia, as just one important example. That’s because Asia’s middle class, in less than two decades, is expected to boost consumer spending in developing regions of Asia to 32-trillion-dollars. In 2008 – just three short years ago – that number was 4.3-trillion-dollars.

That reality behind current global opportunities is why CEOs across the world list “*new geographic markets*” as their Priority No. 3 for growth today, a priority just behind product-and-service development, and existing-market expansion. Again, that’s according to the global CEO survey.

For Xerox, going into new global markets began in the 1960s, our first banner decade. It followed, in fact, on the heels of the Xerox 914’s success and never stopped. Our coverage of the Asia market has been in place since 1962 through Fuji Xerox, a joint venture with Fuji Film in Tokyo. The same joint venture later expanded our reach into Australia and New Zealand, in the same way that Rank Xerox had earlier taken Xerox into Western Europe and, later, countries throughout Africa.

Currently, half of our business at Xerox is generated outside the United States. So our global reach, by itself, is not a new story for Xerox. Like the company’s continued innovation, it is resource material from which your everyday, business-school case study is written.

Innovation and globalization have been the toggle-switches for the company's rankings up or down the Fortune 500 roster since the company first made the list in 1963. They continue to be drivers of our business today.

What is new, however – what I am excited to tell you about today – is the fact that the Xerox you thought you knew, the Xerox of document management, is not the Xerox I know. Not any longer.

Things have changed, significantly, thanks to another, even more remarkable event that occurred two years ago, in September 2009.

Slow, with emphasis.

Shortly after acknowledging the historical, 50th year of the copier that changed vintage Xerox so drastically, our company turned its sights sharply to the future. It took another transformational step, and approved the acquisition of Dallas-based business-services firm, Affiliated Computer Services, or ACS.

Today, because of that bold acquisition, half of our revenue comes from our document-management business. The other half comes from companies – of all sizes and throughout the world – who outsource their business processes to Xerox, so they can focus on their own, core business. For them, Xerox now provides the industry's broadest portfolio of document technology, services and software, and the most diverse array of business process and IT outsourcing support.

That's a mouthful, so let me say it again and break it down: We provide document technology – the industry's broadest portfolio of document-based systems. That's the Xerox you know well, complete with the rapid advances you review when you go shopping for that latest piece of office equipment. And, we provide the industry's broadest portfolio of business services and related software. And last, but by no means least, we provide the industry's most diverse array of business-process-outsourcing support, and IT-outsourcing support.

Slow and deliberate.

In other words, in two years, we've gone from a company specifically focused on document management, to one that helps simplify for our customers, their massively diverse, document-driven work. To illustrate the magnitude of this move, consider that we have grown our market opportunity from \$132 billion to more than \$500 billion.

Pause for reaction.

I want to give you a closer look at the decision Xerox made two years ago. I think you'll agree that ACS, A Xerox Company, provides a textbook example of how derived business synergies, from just the right move such as acquisition, can uniquely position a company for growth.

Affiliated Computer Services, or ACS, was, at the time we officially took ownership in February of 2010, the world's largest, diversified business-process and IT-outsourcing company, with more than 74,000 employees.

It was founded in 1988 and had built a very strong outsourcing profile, particularly in the healthcare sector. But unlike most BPO companies, which

tend to focus on a single market vertical and stay put, ACS had widened its BPO reach to multiple market sectors, both private and public. Among them: communications, manufacturing, insurance, customer care, retail, financial services, education, and transportation.

If your college student had a loan, chances are ACS was responsible for the administration of that loan. If you traveled the New Jersey Turnpike using the E-ZPass system, you had ACS to thank for reduced delays at the tollbooths. ACS processed more than 1-million credit card applications every year, and almost as many healthcare claims. It provided human resource services annually to nearly four-and-a-half-million employees and retirees.

Of course, it still does these things as A Xerox Company. We are talking about forms and records management; automated and on-demand printing; digital imaging, archiving and indexing; document sharing and distribution; mailings; Web-based processes; automated marketing communications – you name it.

So, you can see the sizeable document-management inroads here that Xerox was uniquely positioned to take. ACS would add an estimated \$10 billion in services-outsourcing revenue for Xerox in just the first year.

Conversely, ACS would benefit from the specific profile of Xerox – its innovation, brand name and global scale – in virtually every transaction made on a customer's behalf. Xerox technology would help ACS differentiate its offerings by providing faster, more automated ways to manage clients' business processes.

That is business synergy in the true sense of the word. Most assuredly, it's *value-added*. Customers of ACS and Xerox, with this new company combination, reap significant, end-to-end rewards on multiple levels:

- reduced costs;
- increased productivity and efficiency;
- optimized work processes; and
- simplified document-driven, back-office work.

As demonstrated in our new marketing campaign unveiling our new brand identity, this leaves customers better able to focus on their core business.

SHOW NEW TV SPOTS.

Even Wall Street looked at the acquisition favorably. At first, of course, there was some skepticism; that was anticipated but short-lived. Perhaps it's because neither entity in this grand equation was an unknown. And, both had strengths, independently, in the other's industry segment.

Xerox had an impressive business-services and IT foundation; ACS was fully versed on sound, document-management strategies. Many analysts, of course, noted – as did the Xerox sales team – that ACS would be even *better* versed in document management once *Xerox* machines replaced all other brands throughout the ACS enterprise.

Possible chuckles here.

So, there we were in early 2010: a global, document-centric company with a very powerful brand, taking on a company that practically owns business-

process and IT outsourcing. And, here we are today, as the **world's leading enterprise for business process and document management**. Together, Xerox and ACS are poised to make even more tremendous strides in terms of *innovation, global growth and brand presence*.

Let's talk first about innovation.

As noted earlier, Xerox is known for applying world-class technology to ever-changing business environments. We have existed as *that* Xerox, the one you know so well, for decades.

Now, add these document-management strengths to the service-level experience that ACS has honed, and you have a new kind of company that can do things on a whole new level. One that can integrate and automate processes according to measures. One that can analyze the data that it mines. And, one that can develop *context-based* solutions. It's an entirely new dimension to one company's core competencies by virtue of another's diversity. The result is more value for our customers.

Imagine this model applied to digital health records, as one rather timely example. We can leverage the ACS health-sector client base with Xerox technology platforms to provide enormous expertise in this area, benefitting individual patients or entire communities.

Of course, this type of capability represents one set of opportunities, say, in Austin, Texas. In London, it represents something entirely different. That's where the global scale of Xerox means exponential growth for ACS-enabled services outsourcing.

Currently, 90 percent of ACS's business is in the U.S. To say that leaves room for growth is quite the understatement. Global expansion of the BPO and ITO business, to include small businesses and developing markets, is a phenomenal opportunity for us. Initially, we see the growth of this new brand as a priority in Canada, Mexico, Brazil, Argentina, and, of course, Western Europe, which by itself represents an estimated 3-billion-dollar potential.

ACS and Xerox will each leverage the other's unique business dynamics with its own. We are looking to drive higher margins, and to avoid cyclical patterns through the diversity of offerings. We'll lead with services, and deliver value through innovation and operational excellence. That is the plan for the new "services" face of Xerox.

Meanwhile, we'll ensure the traditional Xerox brand, the one behind the document-management business, continues to grow through newly acquired channels, courtesy of the ACS acquisition and others, particularly in Europe. We'll see that it continues to align itself with ever-changing market dynamics, the newest of these – at least, as of this hour – being a mobile workforce, cloud services, and environmental sustainability. And, we'll see that the brand extends its lead in document-outsourcing, in customized digital printing, and in color business-imaging. Overall, we estimate the growth rate of traditional Xerox

consumer, office and print-production markets to be somewhere from 1 to 3 percent annually, through 2014.

Clearly, this is an exciting time for Xerox. The character of the company has changed, and the outlook for the company has never been stronger.

Already, in its first year after the ACS acquisition, the company has realized more than \$100 million in cost, revenue and technology economies. These were achieved either by cross-selling through all lines of business and across all regions, or by incorporating smarter document technologies. Given the company's 1.5 million document-management devices under management, there's a lot of potential for greater efficiencies for Xerox and ACS – not to mention on behalf of our customers.

But things are just getting started, really, as we combine the mutually synergistic aspects of two strong companies while reinforcing each one's unique strengths.

Xerox will leverage ACS's strength in diversified business-process and IT outsourcing, to set its sights on becoming the world leader in diversified BPO. The ACS acquisition has tripled the markets available to Xerox. The Xerox brand, currently valued at \$6.1 billion and ranked globally among the top 100, will grow even more in the coming years as it expands into new industry sectors.

Similarly, ACS will leverage the strength behind the Xerox brand, as well as its global presence and legendary innovation, to achieve significant and continually diverse growth, worldwide, starting most immediately in Europe and Latin America. The potential there is, in a word, huge.

In addition to growth in new industry sectors, new geographic regions and, as always, new technologies, we plan to expand distribution of our new Xerox-ACS model to capture growth opportunities from small business. Small businesses make up 75 percent of the office market worldwide, and we have plenty of room there to share our strengths.

Regardless of the size of our customers' businesses, or where they are located, or what they do, the promise of the new Xerox-ACS brand is, interestingly enough, somewhat retrospective.

Just imagine the 1959 office, before that shiny and hefty 914 arrived, when duplicating a single document took longer than it takes, today, to confirm transactions with multiple business partners around the world. Imagine the time it took then for a large office full of executives to read that one, single bundle of material, passed around with a little note attached on top – the little note everyone marked off by their name to indicate they've seen that stack of documents before passing it on to the guy in the office just next door.

Possible chuckles here.

As it is today, time was money then. Xerox promised its customers, "The busier you are, the more you stand to gain" from this new copier technology! And, that was true. Resources were freed by that 650-pound machine, and it proved worth

its weight in gold to those companies who wheeled it into their back offices. Only 5,000 were expected to do so; some 200,000 did.

So now, the company steeped in document-management history has taken another momentous step to free-up the resources of today's business office from *its* overwhelming number of routine, time-consuming and often-distracting tasks. Through the ACS acquisition – and other strategic partnerships in recent years – we have fully repositioned Xerox. In doing so, we believe we have fully repositioned the 21st century business office, as well.

By providing a vast array of technology *and* services – by managing our customers' business processes and information needs – **they become more efficient. They reduce the time spent on work that isn't strategically relevant. Their staffs are free to focus more closely on their core business.**

Same pace as the first time.

It's what we mean by "Ready for real business" at Xerox, but – while I probably wouldn't share this with our advertising staff this – it's really nothing new.

Possible chuckles here.

Thank you so much for your time.

* * *