

In-Store™

The Newsletter of In-Store and Internet Marketing & Business

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Jon Robertson,
Managing Director,
Ogden RSC

I can't believe it's spring and we are publishing the fourth issue of *In-Store*. This issue has some great info and insight gathered by my partners Carlene and Janet. A big "thank you" to the many readers who have sent me emails with comments and suggestions about *In-Store*. Please keep the comments coming. Your feedback is welcome and appreciated.

RSS Barcodes on Coupons Do Not Take Longer to Scan

Update from the ACP: New test results are another step in the transition from today's barcodes to Reduced Space Symbology (RSS) barcodes on coupons

A test to assess the performance of Reduced Space Symbology barcodes on coupons found that RSS does not take longer to scan at POS than the barcodes in use today. The findings set the stage for the implementation phase of replacing current barcodes with RSS, according to speakers at the Annual Industry Coupon Conference sponsored by the Association of Coupon Professionals (ACP) in early April.

Joan Wyndrum, vice president of Pinpoint Data, LLC, North Plainfield, N.J., said, "Based on the results of the Phase 0 Test, it does not appear that RSS barcodes show a significant impact on scan performance. Scanner type and equipment age appears to have a more notable effect on scan time."

As a result, she added, the Joint Industry Coupon

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CARLENE'S CORNER



Dear Readers,

I came across a couple of things this month that I thought you might like to hear about.

"The Wise Marketer" online newsletter had an interesting article in its April 6 issue. It explained a study done by the Cornell University Center for Hospitality Research about a new idea for customer comments. **The customer-feedback technique is called "photo-elicitation" and it involves giving cameras to guests and "asking them to shoot pictures of whatever they saw that influenced their opinion of the hotel."** The study's authors, Madeleine Pullman, Ph.D. and Stephani Robson conducted a pilot study at the Statler Hotel. In the study, researchers and guests reviewed the photos together. "The full report, *A Picture Is Worth a*

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Carlene's Corner – continued from page 1

Thousand Words: Using Photo-Elicitation to Solicit Hotel Guest Feedback, has been made available for free download from the Cornell center's web site - [click here](#) (free registration required)." Source: www.thewisemarketer.com

I think this is a fascinating idea for the retail industry, but I have a thought about how to do it more simply. Assuming you have a loyalty program of some kind and can identify your top shoppers, give disposable cameras to your best customers and ask them to do a photo-shopping trip. Maybe you could send a postcard to your top 100 telling them you'd like their help and asking them to stop by the courtesy desk for their "feedback cameras" for use on their next shopping trip. In a retail environment I'm quite sure you could tell by the photo if it's a "like" or "don't like" feature of the store. Long checkout lines, bad produce, messy shelves come to mind as obvious dislikes and beautifully displayed meat or a smiling, helpful employee would be good things. Better yet, give them two cameras, clearly marked on the outside: "Good things" and "Not good things." Nah – tell it like it is. "Good things" and "Bad things." Put a box for depositing the cameras near the store exit doors, or ask the customers to hand the cameras to the cashiers. If one or two of them run off with a camera, so what, especially if they're your best customers - they're worth a free camera anyway, aren't they? I bet you'd get an eyeful of great information *If you don't have a program, maybe a random sample would work, or ask your store managers to give cameras to people they recognize.*

I didn't think we'd go beyond targeted direct marketing in my lifetime, but a company called IntelliMar claims to do just that. The concept is called **"Social Media Marketing" and it is defined as "the Convergence of Social Media Technology and Traditional Relationship Marketing."** While touting the benefits of traditional direct marketing, IntelliMar says that some forms of direct marketing might

be called "interruptive marketing." The different media they propose are on the Internet, of course, but in places where people use the Internet to keep in touch with or meet friends, research products and stay informed.

"Businesses need to be where consumers go to be in touch; at their social connection points (blog lines, social networks, communities, etc.). Through these connection points, they need to provide access to relevant content to capture consumer interest so they can be *invited into* the consumers' community. Once invited and the consumer broadens their community to include you, then traditional direct marketing can begin to have more impact. To achieve this effectively requires focus, expertise, discipline and execution. For IntelliMar, this is our passion." Nothing better than passion in a technology company!

"First, we work with you to understand and appreciate the value of connecting social media with traditional direct marketing and to design your unique solution. Second, we architect and build a technology solution that will support your program strategy...using our state of the art technology platform, Connection Point SM,...Third, we host and operate our platform for our clients, becoming an extension of their staff; being the bridge between where they are today and where they need to be tomorrow." *I think it's worth further investigation, especially to find out ways in which IntelliMar develops content so compelling that consumers actually invite you in to their Internet-based social network!* Contact Tim Black, EVP sales & marketing, tblack@intellimarsolutions.com, call 214-217-4500 X 12 or see www.intellimarsolutions.com

I also talked with Trish Cucinelli, previously Loyalty Marketing Manager and then HBC Category Manager for Pathmark Stores, who is now with StartSampling. I'm a major sampling fan from both a business and a consumer perspective, and have always liked their program.

Trish quoted a study StartSampling did in 2005 that

RSS Barcodes – continued from page 1

Committee (JICC) will proceed with the finalization of the RSS Specification and begin next implementation steps.

Jane Michels, president of J. Michels Consulting, Bloomington, IN., said, “Once the RSS Specification is finalized and approved by the industry, then POS vendors can begin the process of creating code for their scanners.”

The RSS time test, conducted by Pinpoint Data on behalf of the JICC, included these participant groups: Inmar, Kroger, and Symbol; IOS, Ahold USA, Fujitsu Transaction Solutions, and NCR Corp.; and NCH Marketing Services, Target Corp. and PSC.

There were 30 coupons in the test: 10 with the current GS1-128 barcodes (formerly known as UCC/EAN-128 barcodes) and 20 with RSS barcodes. For individual scans, each coupon scanned five times, recording capture time in milliseconds. For basket scans, four groups of twenty coupons – mixed and non-mixed – scanned, recording overall scan time for basket. Each group scanned five times.

Full test results are available online at www.Pinpoint-Data.com/RSSTest0.

The changeover from UPC to RSS barcodes is designed to improve scanning accuracy at the Point of Sale (POS) and reduce fraud and misredemption, as well as allowing for full-offer tracking and more efficient retailer-specific promotions. The changeover is now underway, and is anticipated to take a few years to complete.

“This new technology will improve the efficiency of the consumer packaged goods industry, and coupon professionals are working on the transition,” said John Irwin, president of the ACP. The change in barcodes is part of the larger initiative of global data synchronization of all

Carlene’s Corner – continued from page 2

found that over 65% of consumers report that a free sample has motivated them to buy a product that they did not plan to purchase. *I can personally attest to this. I buy based on samples all the time.* The 65% compares with nearly 30% for a coupon, shelf dispenser, or on-pack promotion. If you ask consumers what would motivate them to visit a particular store more often, over 82% cite “samples mailed to my house.” In a nutshell, says Trish, consumers LOVE to receive samples in the mail. *I’ll have to say I’m part of this group, too. An unexpected little present can spark an emotional bond and the beginning of a relationship.*

Retailers can create “SampleCenters” on their websites, managed by StartSampling. StartSampling manages the creative aspects, processes, fulfillment, and technology, which simplifies implementation – *an advantage for retail marketing folks who may be stymied by their technology departments.* Once the SampleCenter is on a retailer’s website, joint retailer/manufacturer programs can be created. According to Trish, manufacturers are accustomed to these programs and ready to participate. One of the keys that makes web distribution more successful than other methods is that samples are self-selected by consumers; they choose samples that fit their lifestyles. Retailers can also opt-in these consumers to their newsletter lists or append address and other demographic data to databases.

Trish’s final comment: A lot of retailers struggle with content and promotions on their websites. This program should fit in well strategically by driving store traffic and sales and also awareness and website visits. Contact Trish Cucinelli at StartSampling, Inc., pcucinelli@startsampling.com or 718- 966-1114.

Sample RSS code for
Buy A and B, Get C Free (up to 1.00)

RSS SCANNER PERFORMANCE TESTING

TEST ID: 22
 FORMAT: RSS
 BARCODE DATA: 81101022222022221011022211110123112345672110456
 14567890312310691101

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RSS Barcodes – continued from page 3

product and promotion information. A big step in this process occurred on January 1, 2005, when the Uniform Code Council (UCC) – now called GS1US -- urged manufacturers and retailers in the U.S. and Canada to accommodate EAN 13-digit and 8-digit symbols as well as North America's traditional 12-digit UPC symbol. This will permit U.S. and Canadian retailers to scan imported EAN-labeled products without the requirement that these products bear a UPC code. In conjunction with this initiative, GS1 US will also begin assigning manufacturer prefixes that can vary from 7 to 11 digits. Current coupon barcode formats will not permit coding of these longer prefixes.

For more information, please contact Joanne Martori Association of Coupon Professionals
847-297-7773 joanne.martori@acp-hg.org

Interview with Tactical Retailing Solutions

I had the chance to sit down with Seth Epstein, one of the founders from Tactical Retailing Solutions (TRS) and find out what's new and why are retailers successful with TRS programs. Seth is the President & CEO and is responsible for the operations at TRS.

Jon: For the benefit of our readers, can you give us some brief background information on TRS?

Seth: Yes, certainly. Most people know us as TRS. TRS stands for Tactical Retailing Solutions and we were founded in October, '96. We had an idea that we could develop a kiosk that would do a whole host of things. The mindset was that we could create the silver bullet kiosk! It would show you a video; it would give you product information; it would give you a coupon. If the retailer or a brand wanted to get a message out there, the kiosk would do it.

What we quickly learned was that this silver bullet approach was a very bad idea. It was a bad idea for high volume environments such as grocery, mass merchandise, drug, etc. For those who remember, this might be called the "Inter-Act model." The delivery mechanism was wrong because of one key issue: throughput. We realized that we had to determine what might be important to this customer *and give it to,*

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Newly-Released Customer Centricity Study

The National Retail Federation has just released a study that our company conducted that identifies the status of customer relationship management and customer centricity in the retail industry. The *Customer Centricity Study* has surveyed more than 200 retailers across industry segments (department store, specialty, grocery, etc.) over the past five years concerning their strategies, techniques, and technologies for building relationships with customers on a more personalized basis. Please contact me (jmurphy@ogdenconsultants.com) if you have questions, or if you would like to receive an executive summary of the study.

While this study is not grocery-specific, its findings tie broadly with our research on the grocery side, including the new 10th Annual Card-Based Marketing Report, prepared specifically for CPG, technology and other industry suppliers. The bottom line for retail in general, and grocery in particular: **the rate of adoption of CRM and loyalty programs has slowed, but many companies that have already adopted a customer-centric business strategy are developing more sophisticated and effective programs and are using customer insight in increasingly effective ways.**

Following are some highlights of the multi-industry segment 2005 Customer Centricity Study.

- Retailer commitment to Customer Relationship Management (CRM) remains strong
 - 65% of respondents say their 2006 CRM spending will increase
 - Fewer than 2% of the respondents say that their CRM spending will decrease in the coming year.
- Retailers are using customer insight not only to target offers to customers. They are also using it more and more to drive strategy and decision-making across the organization.
 - 87% of respondents use customer

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them in 3 seconds or 5 seconds. We had to do this and release a satisfied customer quickly - to go shopping which is what they came to the store to do. At the outset, we actually had *three* products and each of them could have been exploited into a business. We had to make the hard decision to choose what we wanted to do when we grew up. We gravitated towards the distribution of offers and information, and that was how TRS was really born and our product was born.

Jon: How are retailers using TRS today? In particular, what's the new, innovative twist from your first drug installation in New York?

Seth: First I'd like to share some concepts that we believe are vital. One is flexibility, so that we can enhance the execution of retailers' unique and different strategies. We didn't go into our customers and say, "Here's the program, good luck!" We work in a consultative fashion. We determine what the retailer's objectives are, and what programs the retailer is focused on that fit for this specific kind of touch point. This is important because, in a sense, we become a spokesperson for that retailer to the patron who visits the kiosk. We want it to be analogous to the speed pass: we ask nothing of the customer. The goal isn't just simplicity; it's *extreme simplicity*.

Back to your question, "How are retailers using TRS?" The answer is: in ways that are simple and straightforward from the customer's standpoint. The retailers aren't asking their customers to go on a complicated adventure. We have retailers running points programs and we're, in a sense, the spokesperson for the points programs. Another example: we have retailers running club programs. The kiosk plays any of several roles, such as telling customers where they stand in that specific club, giving detailed information about what's happening with that club, or conveying information that's important to that individual customer.

Jon: That's interesting. How do accomplish the targeting?

Seth: Retailers have created their own targeting



I recently visited a Jewel-Osco store, and the *avenü*SM customized savings kiosk. Customers swipe the bar code on your Preferred Card or key tag across the scanner and the *avenü*SM kiosk will print your savings. Fast and simple and the customers are on their way. It looks like the customer appreciate this type program

mechanisms or they have purchased a targeting mechanism that allows them to figure out what the customer is buying, and what's likely to be of interest. We build a bridge to their systems so they can utilize this targeting intelligence to "speak" through our machine.

Jon: What is the value proposition that you provide to the retailer? Does the retailer buy your system? Do you bring in manufacturers' support?

Seth: The tie to the retailer's unique strategies is key again here. Sometimes there's an existing feature set that the retailer would like to tie to this touch point. Based upon what the retailer's goals and initiatives are, we also bring intellectual horsepower that helps bring the strategy to fruition: how to use the technology, how to market, and how to frame the economic proposition. So we typically do not "sell systems" per se. We have, and we may continue to do so, but what we tend to do is bring the system into a retailer, customize it to empower the business strategy, and bring in brand support.

Jon: There's a kind of chicken and egg situation that's often been the demise of kiosks and in-store touch points. The manufacturers don't support them because there isn't a national network, and the retailers aren't really driving manufacturer trade dollars into them.

Seth: You're right. It is a chicken and egg situation. We've been fortunate that we've been able to show some very good results. We have many brands working with us today that are participating in a general offer theme and a targeted offer theme, and we are growing quite rapidly now. We're also staging our national network.

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Jon: What is the size of the network?

Seth: Today we have several hundred stores deployed. I would say that by September there will be several hundred more deployed. We have several new retailers under contract for deployment, and more in the pipeline. We're working towards about a 6,000-store network, and that's pretty much our goal for three to three-and-a-half years out.

Jon: How many brands are supporting the system?

Seth: Some of the programs have approximately 70-80 brands involved.

Jon: The good news is that you've been around for ten years. So, with so many companies having come and gone in the interim, how have you survived? What's the source of your staying power?

Seth: Candidly, I think that we have a model that works. You were asking about the economics. We do a fee-based program where you can rent systems, services, ID support, marketing support, and content on a monthly basis. We have done a number of programs that way. For us, staying power has been figuring out a way to make our company successful in terms of this: Can we make money doing what we're doing while the industry is sort of "catching on," if you will? The simple answer is that there has been tremendous funding.

There are several kiosk companies cropping up now. I don't want to say that it's an uneducated premise, but these new companies believe kiosks are a new idea and that they are just going to put a device in a store, print a coupon, and make a lot of money. As we've been discussing, it's far more complicated than that.

One of the gifts that we've had over the years is that we've been able to do a lot of research and development into how this technology needs to work, how to interact with customers in an effective and meaningful way. And in our world there are really three customers to be addressed: the brand, the retailer, and the consumer. To be

successful you have to have a meaningful value proposition for all three.

Jon: Let me ask about the consumer side. Have you done any focus groups or other consumer research recently? What does the consumer say and, in particular, how do kiosks impact the customer experience?

Seth: Consumer research is crucial. We engage in mini research projects as an ongoing business effort within the company. We do research for retail customers as well. We do our research at a number of levels. We try to determine what loyalty really means and who/what loyalty really points to. Is it to brand? Is it to change? Is it to the retailer? A combination?

In the end, it really comes down to one important thing: how to engage all three of customer constituencies: brand, retailer, and consumer. Particularly important is the consumer, because if the consumer is not going to participate by activating the device, then we certainly have a non-starter. Also, we can't satisfy the retailer and we can't satisfy the brand if we cannot engage the consumer.

We've spent an enormous amount of time trying to figure what moves the consumer to play. There are a number of components. Number one, placement: where is the unit placed within the store, and how easy is it to get to? Number two: reliability. Number three: speed. Number four is more of a customer-specific answer: relevance. You need to give the customer something that's pertinent to their life style.

Thanks for the information, Seth. For more information, contact Seth Epstein at 860-244-3600, sepstein@trs-pss.com

Customer Centricity – continued from page 4

- information in corporate strategy-making
- 92% of respondents use customer information to steer Marketing strategy
- 67% of the respondents this year say they use customer information for Merchandise Planning, as compared with 42% of respondents in 2004
- 61% use customer information in planning Merchandise Assortments, vs. 52% in 2004
- 51% use customer information in Store Planning, vs. 31% in 2004.
- Concerns that had dogged CRM in earlier years of this study, such as CRM costs and consumer privacy issues, have dissipated
- While 82% of the study's respondents in 2003 felt that the start-up costs of CRM were an obstacle to achieving objectives with CRM, only 61% of respondents in the 2005 study express this concern.
- Customer privacy is perceived as an obstacle by 41% of the 2005 respondents, vs. 67% in 2003.
- Retailers are achieving increasingly rich customer insight by integrating customer transaction data with market and customer research, direct customer feedback, and other sources.
- 36% of respondents in the 2005 survey say they capture feedback from customers daily, vs. 8% in the 2004 respondent group
- Retailers are deploying a wide variety of techniques to build customer understanding including market and customer research, focus groups, store intercepts, supplier input, web statistics, third-party data, Internet research, etc.
- Nevertheless, improvement of retail processes and organization still lags behind retailer expectations, and this lag is standing in the way of retailers achieving the full benefits they desire from CRM.
- Retailers across the board acknowledge the importance of transforming their organizations and business processes to “put the customer first,” but only 44% have made the organizational improvements, and 59% the business process improvements, that they believe are necessary to achieve full CRM benefits.
- Processes for disseminating and using customer information throughout the organization have not been put in place; only 12% of respondents are satisfied that customer information is getting to the places in the organization where the information can be used.
- The top obstacle to reaping full benefits from CRM, cited repeatedly by respondents over the past several years, is a lack of alignment of cross-company activities to focus on the customer
- Many retailers are concerned about the lack of proven return on investment for CRM initiatives, with 60% of 2005 respondents citing this as a somewhat challenging or very challenging obstacle.
- Retailers have made good progress in tying individual programs, such as Marketing campaigns, to customer metrics. However, most companies still lack integrated metrics that allow measurement of overall customer strategies at the corporate level, and that also drive department-level performance in such key areas as Merchandising and Store/Channel Operations.

Each Retail Discipline Plays an Essential Role



GEMCON, October 9-11, 2006 “The Canyons” Resort, Park City, Utah

We hope to see you all at GEMCON! Save the date: October 9-11.

We’re planning an extraordinary program in an extraordinary location. Park City is the home of the Sundance Film Festival and the 2002 Winter Olympics. The Canyons is a fabulous resort hotel, 35 minutes from the Salt Lake City airport, at the foot of the Wasatch Mountains. The hotel features a great set-up for the conference and exhibit hall, economical room rates, good flight options from many cities at quite good rates, good opportunities for the store tour, etc.

The overall theme this year is: "Seizing the Extraordinary Opportunity: Building Shareholder Value through Customer-Centric Retailing"

1. Status, trends, and new directions in Electronic Marketing, CRM, Customer Centricity, Loyalty
2. Using customer knowledge to drive product assortments, pricing, merchandising, visual merchandising, promotions, advertising, space allocation, store operations, web environments, and more
3. Improving the value of your loyalty and CRM programs through collaboration with suppliers
4. Implementing effective “personalized” programs on a large scale
5. Collecting, integrating, and leveraging direct customer feedback
6. Continuously improving in-store execution and cross-channel consistency
7. Implementing Internet-based solutions, including interactive websites - targeted online circulars, shopping lists, recipe generators, real-time consumer research and more

8. The in-store experience - improving the customer experience and reaching the consumer at the point of decision

9. Performance measurement in a customer-centric world...

10. What you should know about protecting your data assets and customer privacy

11. How social responsibility can mean good business

....and much more!

Please e-mail us for more information, and with your suggestions on the most important topics for your company and the industry:
GEMCON@ogdenconsultants.com.

We’ll look forward to hearing from you!



“The Canyons” Resort, site of GEMCON 2006

Back Page by Janet Murphy



Improving Your Marketing ROI: Insights from the World of Six Sigma

Ogden's President, Janet Murphy

Frequent shopper program growth has slowed, and grocery retailers haven't exactly thrown themselves headlong into "customer-specific marketing." No wonder. Many retailers feel that the ROI of such programs hasn't been fully demonstrated yet.

Grocery's legendary pressures are an ever-present reality, and nobody's in a position to take chances with the bottom line, however self-evident the notion of customer-specific marketing may seem to be. So how can companies - retailers and CPGs alike - move forward in a measured, bottom line-oriented fashion with the customer-centric business strategies that so many companies acknowledge to be essential to their ultimate survival?

World class Quality Improvement methodologies like Six Sigma hold at least part of the answer, irrespective of whether a company actually implements such a methodology on a formal basis. The discipline of Quality encompasses a rich reserve of principles and methods for meeting or exceeding the needs of customers, while hewing as well to very concrete, measurable goals such as increased sales and profitability, and reduced cost.

Following is a sketch of a four-part process for moving forward with customer-centric marketing, email promotions, in-store offers, etc. keeping both customer centricity and *shareholder* delight squarely in view. This list is inspired by Six Sigma's principles and methods, and also by what been demonstrated to work effectively – both inside our

industry and beyond.

Start by understanding who your customers are, and develop measurable goals that accord with the best customer opportunities. A simple checklist...

1. Have you identified groups of customers that share characteristics and buying behaviors and with whom you will develop ongoing relationships?
2. Have you developed a concrete customer promise or value proposition that is understandable to your customer groups and your entire organization?
3. Do you understand where and how you connect with your customers, considering all the potential touch points?
4. Have you set measurable goals for the improvements you what you want to achieve?

Use your data resources to validate, or invalidate, your creative and intuitive ideas about what will work best with your customers.

1. Do you have a set of metrics for gauging your performance, not only in internal/financial terms, but also in the *eyes of your customer*?
2. Do you conduct analysis to prove, by reference to your data, which kinds of programs tend to work with specific customer groups, which work the best, and which don't work at all?
3. Do you develop and test potential strategies to reach your measurable customer objectives so you can select the best...and discard plans for programs that won't pull their weight?
4. Do you establish priorities and phasing based on what will have the most substantial and positive *customer* impact?

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Marketing ROI - continued from page 9

Coordinate with the rest of the organization to ensure consistent and continuously improved delivery to the customer promise.

1. Have you done your part to promote a customer-centric culture, where everyone in the organization understands the customer promise and exactly how his/her role is meaningful and essential to delivering to that customer promise?
2. Have you developed marketing programs based on what you've proved to be most likely to be effective for particular customer groups?
3. Have you coordinated with all other impacted functional areas (IT, training & development, change management, store ops, web, etc.) to ensure they understand the goals and are prepared to support?
4. Have you done the necessary, working with Category Managers, Merchandisers, Supply Chain partners and/or other groups responsible, to ensure that product will be available at the right time and place to support your programs?

Monitor and manage performance based on your customer objectives.

1. Have you established a plan at the *customer* level (e.g., sales by customer group; customer acquisition and retention plans, etc.)?
2. Do you capture customer feedback on an ongoing basis so that it can be analyzed and used as an ongoing source of fresh input?
3. Do you monitor and manage performance to customer objectives on an ongoing basis to ensure that you are meeting or exceeding customer expectations?
4. Do you leverage your customer insight,

organizational and process excellence, and retail technology to inspire continuous innovation companywide in the service of your customer?

It might be an interesting and profitable exercise to grade your company on a scale of, say, 1-4, based on your response to each question. Also, you might ask, "If not, why not?"

Is this helpful? Please let us hear *your* insights into what makes for success in implementing customer-specific marketing programs.

I'd love to hear from you at
JMurphy@ogdenconsultants.com!

Janet

15th Annual Global Electronic Marketing Conference

GEMCON

**October 9-11, 2006
Park City, Utah**

*It's all about seizing an extraordinary opportunity...
building shareholder value
through Customer-Centric Retailing.*

Note: Customer Experience graphic on page 7 thanks to Pamela Massenburg, Chair, Customer-Inspired Merchandising, Ogden