

# In-Store™

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### **The Valassis/ADVO Acquisition: The Hidden Logic**

On August 16 two companies prominent in our industry were granted Federal Trade Commission approval to move forward with plans, and Valassis acquired ADVO. The more things change, the more they remain the same. The historians among us may remember when ADVO owned an FSI company that was spun off to Quad Graphics. It was 1983 and ADVO was approximately \$400 million in sales.

The spin-off of Quad Graphics permitted ADVO to concentrate on the geo-targeting and marriage-mail capabilities that were driving the move of advertisers from the traditional newspaper inserts and ROP to direct mail. The loss of advertisers was so great that in the early 80s it drove the major newspapers to come up with new products to compete with this new media. Most of the papers simply went into the direct mail business with programs that mailed their non-subscribers in programs termed "total market coverage." The outcome was unfavorable for many newspapers: reduction in revenue in core products and added cost of new non-core products.

Wall Street doesn't seem to like the Valassis/ADVO combo. First, the customer bases of the two companies are serviced with completely different strategies and customer needs (mass distribution vs. geo-targeting). Secondly, they compete against each other there. Competition has made each company strong in its own sector, but combining them is unlikely to produce the economies of scale and savings The Street typically seeks in these situations. In addition, added cost is a near-certainty as the combined company tries to manage internal account conflicts and sector strategies, not to mention the fact that both sales and marketing teams will need to have strong employee retention programs in place.

Valassis stated that the two entities had little overlap in their client base. 43% of Valassis revenue comes from consumer package goods, and ADVO drives 26% of sales from the retail grocery sector. The perfect storm: trade promotion meets consumer promotion...under the same corporate umbrella. Grocery retailers will need detailed analysis to make sure the new combined company keeps strategies aligned properly within each

*Continued on page 2*

portion of the business. CPGs are kings in the Valassis world, and traditionally the retailers have made sure that their own strategies and needs continue to be served. The combined company will be managing both the consumer promotion dollars delivering promotions for the CPGs, *and* CPG trade dollars from the retail advertising departments. Temptations by Valassis to offer combination buy as part of their FSI marketing efforts could look very similar to what News America has been promoting across their product line. Valassis may think hard about the lawsuit it has in place against News America before this goes too far.



ADVO is the largest user of the post office and has local sales offices all over the country. Valassis, on the other hand, needs the newspaper companies for their distribution. Remember that ADVO now competes against the newspapers. From this point of view, Valassis' acquisition of ADVO could benefit News America's newspaper relationship by providing News America with a better, stronger negotiation position with the newspapers.

The local advertisers, which are profit drivers for ADVO, represent business that the newspapers need. The continued loss of this local business could create some difficult meetings when Valassis is negotiating distribution deals with the local newspapers. The FSIs have always cited demographics in selling against other media choices, emphasizing that newspaper readers are typically coupon users. They will need to change that strategy if they want to start using ADVO to distribute the CPG inserts. This is likely the big idea here: *targeted direct inserts*.

The potential conflict inherent in managing both consumer and trade promotion dollars could also turn out to be an advantage for the combined company. FSIs are the single largest coupon distribution method at 87.9%, as reported by CMS in their coupon trends 2006 report. FSIs also have one of the lowest redemption rates: 0.68%. These numbers demonstrate that the industry needs change. This could start with Valassis taking a close look at the products offered by ADVO, and specifically the targeting capabilities, and determining how they can improve the product movement rate, which in turn will help the redemption rate, of FSIs.

#### Top 10 - Percent of total coupons distributed by method

Method	2005
FSI	87.9
In-Ad	3.4
Magazine on-page	1.3
Electronic Checkout	1.0
Handout	0.9
Direct Mail	0.7
In-Pack	0.5
Instant Redeemable	0.4
Inst. Redeem. Cross promo	0.4
Direct Mail Co-Op	0.3

2006 CMS coupon trends report

Retailers are using more and better tools to analyze and improve their trade dollar expenditures. As this trend continues, we may finally see the reduction in consumer promotion spend on FSIs, and increased control by the retailer of the total spend. The new Valassis could be aiming to achieve exactly this. Let's wait and see.

## CARLENE'S CORNER



Hi Everyone!

I thought I would share my excitement about GEMCON 2006, our fifteenth year! We'll be covering a broader range of topics than ever before, and including insight from retail sectors beyond grocery. For years, supermarket retailers have asked us to include more speakers from what I affectionately call "non-food retail." Janet and Jon, of course, are in a perfect position to deliver this. So I'm looking forward to seeing many new and exciting things on the GEMCON stage. Let's take a closer look!

First, the conference kick-off. Look for more details in our next issue about very colorful speaker who will kick off the conference in an unconventional way, focusing on the subject of The Greening of America. Can't wait! He'll be followed by Pamela Massenberg from Ogden who will take the theme further with "What's new and what's hot....from going green to gourmet-to-go." Pam is Ogden's Customer-Inspired Merchandising Chair and the company's "visionary merchant in residence." Accenture, Ogden, and TDLinx will then do a rapid-fire overview of happenings and trends in retailing, with special emphasis on Innovation, one of GEMCON's four key themes.

Topics like intellectual property and data security always impressed me as dull, but Janet tells me that attorney, dynamic speaker, and acclaimed legal writer Lennie Nuara of Thacher Proffitt will have us sitting on the edge of our seats as he shares his expertise on privacy issues, contracting for e-commerce services, the protection of "digital sweat," and more. Sounds like Lennie will entertain as he explains!

Brian Zeug from Yahoo! will fill the GEMCON audience in on how CPGs are beginning to achieve real marketing integration through social media, word-of-mouth marketing and other vehicles "to find and amplify the credible voices that influence purchasing decisions to drive their business"....and will include concrete examples and implications for the future of CPGs and retailers. Wow!

Jack Garzella, who runs IT operations and data warehousing for Overstock will join Sam Gragg from Teradata on the stage. Overstock buys overproduced items and offers sales of up to 80% off retail, and they have an online auction area, similar to eBay. Jack discussed his company's needs in an article last January in DMNews: "With several terabytes of data stored in our enterprise data warehouse, and millions of transactions taking place each day, we needed to find a way to ensure our data warehouse was constantly updated. We wanted to enable our sales, finance, marketing and merchandising teams to have access to near real-time data so that they could make timely, more intelligent business decisions." It's Jack's job to make sure his "data-dependent staff" have all the technology tools they need, so he understands the need for precision and accuracy and will enlighten us on how Overstock's systems handle it all. *I'm hoping, yet doubting, that Jack could be as entertaining as his CEO was last December in a television interview. I'll whisper the fascinating details when I see you at The Canyons.*

Tim Anglum, former CRM Director, Best Buy will lead an all-retailer panel discussing Measuring Success and Driving Innovation with Vitamin Shoppe Backcountry.com and representatives from several other great retailers.

**Thacher  
Proffitt**

**YAHOO!**

**Overstock.com**

**Teradata**  
a division of **EMC**

**backcountry.com**

**THE Vitamin  
Shophe**  
SINCE 1977

## CARLENE'S CORNER - continued

Michael Schiff of Partners in Loyalty Marketing will bring together brand managers from three HBC companies – Dale Brooks from J&J Merck; Craig Ziemkiewicz from Abbott Labs and Garrett Putman from McNeil Consumer Healthcare. These managers of high-margin products will talk about how they select retailers with frequent shopper data for collaborative programs, plus show-stoppers that will make them say “no thank-you.”

**PARTNERS IN LOYALTY MARKETING<sup>INC</sup>**

**Johnson & Johnson** • **MERCK**  
CONSUMER PHARMACEUTICALS CO.

I'm also looking forward to hearing from the owner/operator of Urban Market Grocery Stores in Dallas, a grocery and café, similar I think to eatZi's that has now expanded to five U.S. cities. Urbanmarket is the only full-service grocer in downtown Dallas, located in a “residential renaissance” area. One of its customers was quoted as saying, “It's like three stores rolled into one: Whole Foods, Central Market and a regular grocery store.” It seems like more than three to me. They have outdoor food service including Sunday brunch and a quesadilla bar plus evening entertainment that features Latin Jazz and singer/songwriter Colin Boyd.

Happy hour features \$3 house margaritas, mimosas and Bloody Marys made from scratch with Urbanmarket recipes. Urbanmarket Mobile Rewards program rewards shoppers as it track purchases for greater personal service and an Internet-based personal shopper list can be customized at home and emailed back for delivery by noon the next day. And the company is in the process of implementing more interactive technologies that we'll hear about at GEMCON, including MobileLime's cellphone-based loyalty rewards and automatic payment system.



*Urban Market Grocery Stores in Dallas*

**mobile.lime<sup>®</sup>**

Last but not least, our own personal favorite independent retailer, Marv Imus, will fill us in on how his implementation of ScanAps' keychain-sized Personal Coupon Scanner is proceeding. The system validates, redeems and clears coupons at the POS to cure the ills of Coupon Land. In addition to lively small-town, down-home stories of employees and consumers, Marv is known for testing much of the new technology in the industry and he implements only the best. It'll be interesting to hear what Marv and his customers think of ScanAps' system.

There's more on the agenda, but I'm out of space for this month. Go to [www.ogdenconsultants.com](http://www.ogdenconsultants.com) to see the rest and register NOW for GEMCON 2006! Enjoy what's left of the summer and I look forward to seeing you in Park City in October!



## Trend Focus: Going Green, Part Two

A notable 58%\* of tweens agree that taking care of the environment is important to them. Tweens, defined as the population segment between eight and thirteen years old, can be spectacularly fickle, adopting and abandoning fads at the click of a mouse. Fortunately for their sake, the movement toward going green is a solid trend, not a fad, and what a powerful group they are to influence such a positive trend.



*Pam Massenber*

Marketers have likened the spending muscle of tweens to the baby boom population and believe that they will drive the economy throughout the next half century. According to Anne Sutherland, co-author of *Kidfluence: The Marketer's Guide to Understanding and Reaching Generation Y—Kids, Tweens and Teens* and partner of the consulting firm Planning Ahead Inc., “Companies who develop a positive relationship with this group will be better positioned for future success.” Resonating with the tween audience is another story since they have grown up under the influence of savvy brand and marketing strategists; at the ripe age of eight, they are often already highly educated and experienced consumers. To that point Ms Sutherland believes “Tweens are much more than simple cash cows. They are sophisticated, savvy and influential.” Consequently, earning their loyalty is going to take more than a slick ad campaign and implementation of yesterday’s successful strategies. You’re going to need to speak to them about what they care about with authenticity at every customer touch point, and live your brand authentically from the inside of your company out.

With over half of tweens looking toward making the environment better, going green *with meaning* is a good place to start courting this mighty group.

Let’s take a look at one of the many touchpoints ripe for green flag-waving: building. We’ll look more closely at things like packaging and services in future issues of In-Store and, of course, at GEMCON.

### *Green Building*

As the New York Times put it in a headline on August 13, 2006, “It’s Getting Easier To Be Green”. Once considered a big investment with little return on the environment, advances in sustainable building have brought prices down, while raising efficacy. And once scarce resources for sustainable building are now abundant. Members of the US Green Building Council (USBC) <http://www.usgbc.org/> developed and continue to refine LEED (Leadership in Energy and Environmental Design), which provides a complete framework for assessing building performance and meeting sustainability goals. Based on well-founded scientific standards, LEED emphasizes state-of-the-art strategies for sustainable site development, water savings, energy efficiency, materials selection and indoor environmental quality. At Natural Resources Defense Council (NRDC) <http://www.nrdc.org/> you will find case studies for a variety of green building projects.

Building green shows you are committed to the environment, in a big way, and literally places a framework around every aspect of your business. It also shows you’re committed to your customers, who increasingly put matters of the environment at center stage.

## Back Pages by Janet Murphy



### The Emerging Discipline of Innovation Management

Janet Murphy

How did a one-hundred-year-old family grocery business in Texas grow to become today's innovative purveyor of "H-E-B *goodness*?" and the 10<sup>th</sup> largest privately-held business in America? How was it that Dayton-Hudson morphed into the dynamic Target Corporation while their fellow department stores continue to labor under intense pressures to this day?

Consider, for contrast, the once dynamic and now defunct Woolworth Corporation. Woolworth pioneered the chain store concept in the early Twentieth Century, along with their grocery-side contemporary A & P, and created a never-before-seen format, the five & dime. The prototypical mass merchant, Woolworth attained economies of scale and passed on low prices to

their customers, establishing a benchmark of efficiency for modern retailing, and garnering a spot for themselves as a mainstay of Main Street for the better part of a century.

But then, why did the pioneering retailer Woolworth falter and die in the mid-Nineties, even with a creative chairman at the helm, Roger Farah, who went on to bring Polo Ralph Lauren, the innovator *par excellence* of lifestyle retailing, to even greater heights? Actually, in general, why do some retailers break through a prevailing mediocrity and achieve greatness while others don't? Is it a matter of leadership, an abundance of creativity, the quality of execution, a happy convergence of company *whatever* with consumer and market trends? All or none of the above?

### ***The Rise of Innovation Management***

It's an easy guess that retailers today spend a great deal more time thinking about comp store sales and store budgets than about innovation. Given retail's pressures, it sometimes seems in fact that *any* concern beyond this coming Saturday is in the realm of long-range planning. Why should a conscious and planned-out drive for innovation merit center stage? Isn't innovation largely a matter of intuition, inspiration, and creativity? Increasing supply chain efficiencies, improving marketing ROI, or upping inventory turns certainly demands planning, attention to the numbers, best-practice implementation, and the like. But is innovation really that kind of thing?

Grocery industry suppliers seem to think so. CPG companies are facing up to the notion that innovation isn't an entirely right-brain activity, and that the creativity and inventiveness of their human resources can be channeled more profitably through an end-to-end innovation process.

As the wheel of business evolution continues to turn, an increasing number of companies are reminding themselves that eliminating fat and controlling costs is not going to put their companies, or America for that matter, at the competitive edge. While innovation has always been at the foundation of successful companies, the way executives view innovation has changed. Increasingly, the conscious focus of corporate America is on managing innovation as a driver for growth and ultimately sales, profitability, and shareholder value.

### ***Some Examples***

In 2003, Kimberly-Clark embarked on an initiative precisely along these lines. Under the leadership of Innovation Chief Cheryl Perkins, Kimberly-Clark set in place a company-wide innovation process that put structure around how the company would spot and bring to fruition the promising insights and technologies needed to enhance their competitive differentiation and advantage. This innovation framework is credited by management for the successful launch of new baby offerings, including Huggies Cleanteam toiletries in early 2006. “Kimberly-Clark has reenergized the \$680 million baby and toddler bath and body category since entering the market with Huggies Bath & Body toiletries in late 2004,” said Steve Kalmanson, group president, North Atlantic Consumer Products. “With the launch of Huggies Cleanteam toiletries, we believe we will further drive category growth with exciting, innovative solutions that help moms teach their kids the importance of being clean, while having fun in the process.”

P & G also places a specific management emphasis on innovation. Earlier this year, P & G was cited by *Business Week* as No.7 on its list of the most innovative companies (just behind an elite group of companies including Apple, Google, 3M, Toyota, Microsoft, and GE, yet ahead of such acknowledged innovators as Starbucks, eBay, and Southwest Airlines. P & G also ranks ahead of *every* retailer on the list. The list of retailers, conspicuously short on traditional grocery stores, includes IKEA (#19), Wal-Mart (#20), Amazon (#21), Target (#22), Whole Foods (#36), Tesco (#38), Bang & Olufsen (#48), Woolworth (chains using this name survive in the United Kingdom, Germany, Mexico, Australia, New Zealand and South Africa), Spanish fashion retailer Zara (#59), Costco (#84), Home Depot (#92), vertically-integrated luxury goods company LVMH, and Gap (#94).

Over the past few years, P&G has moved toward what it calls an open-source innovation strategy, with the intent to put to use nothing less than the collective brainpower of the world. To bring this hyperbolic-sounding goal to measurable concreteness, P&G has set a goal that 50% of the company's new products should originate from inventors, scientists, and suppliers outside P&G labs.

Like Kimberly-Clark, P&G has implemented organizational change to accord with this conscious focus on innovation. Larry Huston was named for a new position called vice-president for innovation and knowledge, which was established to connect and focus innovation efforts companywide. Each individual P&G business unit added a manager responsible for driving cultural change around the new model.

### ***The Central Challenge of Innovation***

Everyone is exhorting retailers, and America as a whole, to innovate. It's the only remaining route to advantage for American business, according to Tom Peters. But exactly what enables a company to be innovative? Can innovation - the creation of something new and perceived as desirable by the marketplace - really be founded in data analysis, and driven by structured methods and rigorous analysis?

Boston Consulting Group (upon whose research and analysis *Business Week's* list is based), and an increasing number of corporate leaders and professional thinkers, would say, “yes.” BCG has done benchmarking work, as well as research, on innovation and makes a fundamental observation about the central challenge and ultimate measure of innovation: what counts is less the number of great ideas a company has, or even the quality of execution, and more the extent to which a company brings *the very*

*best of a company's potent ideas* to the marketplace. It's about spotting, selecting, nurturing, and launching those vital few.

There are many different theories and frameworks for exactly how to go about doing this, and we will discuss some of these in next month's *In-Store*. We will also at that time profile some of the innovative companies in the In-Store/GEMCON community. In the meantime, let's take a look at what appears to be a clear pattern in what is eventually deemed innovative within the world of retailing.

### ***Getting to Aha!***

Trendwatcher Pam Massenburg has discussed in her *In-Store* articles the multiplier effect that can come from spotting and riding multiple trends. Much, if not all, innovation comes from simultaneously tapping multiple trends that seem at first to be contradictory - often precisely a trend and a counter-trend. Let's look at a few examples.

Whereas Woolworth made important everyday items readily accessible and affordable for a mass market, thereby bridging an apparent contradiction (the ready accessibility of necessary items at a low price), the office product purveyor Staples did its own reconciliation of seeming opposites. Staples brought "easy-ness" to something deemed by consumers and small businesses as anything but easy before Staples came along: provisioning a modern-day, technology-enabled office. Staples invented the office superstore concept in 1986, and has played out the formerly oxymoronic easy-office products concept into a mega-business accounting for \$16.1 billion in sales last year.

At Staples' inception, consumers were both working more outside of the confines of a traditionally structured work place, and increasingly protective of their scarce leisure time. Staples' fundamental insight leveraged both the growth of home-, mobile-, and decentralized work environments with the lifestyle-preserving "easy-ness" demanded by a leisure-starved consumer. In doing this, Staples caught the compound demand wave created by burgeoning home offices on the one hand, and the increased need on the part of both harried consumers and pressured businesses for ease and speed.

Staples continues to play out, vary, and evolve the innovative easy-office products theme to track closely with the hearts and minds of their customers. Consider the current Easy Button ad campaign. In addition to the ads themselves, over 100,000 Easy Buttons have been sold at \$4.95 each with a substantial portion of the proceeds going to the Boys and Girls Club of America – one among many examples of Staples' response to its customers' desire to get what they want, while also "giving back." Staples catches the wave: today's consumer's need for easy-ness, on the one hand, and the assuaging of social conscience on the other.

Consider another example: Target. Target turned on its head the alleged contradictions between low cost and fashionability, and between low cost and high quality. The payoff for this innovative approach: not only strong year-to-year performance, but also a clientele that is younger, better educated and affluent, than its competitors. The goliath in Target's arena being Wal-Mart, any and all advantages in this regard are worthy of note and study!

Ralph Lauren, in an astonishing fusion of contradictory elements back in the 1960s, made a lifeless staple of men's clothing into a lifestyle beacon, a status symbol, a vehicle for personal expression, and the founding element of a company that today positions itself not to sell ties or any products at all, per se, but rather a way of living.

Innovation in retailing, then, seems to center around resolving contradiction, creating meaningful experiences that satisfy seemingly (and otherwise) irreconcilable needs, wants or aspirations on the part of customers. Interestingly, the resolution that ends up being recognized as *innovation* is *not* typically the one that delivers a compromise.

Retail's evolutionary turning points have *not* been created by average levels of availability at middling price levels; office products that aren't all-that-tough to select or implement; a fair degree of fashionability for an OK price; or even a better version of a boring, narrow tie. It's not about actually about compromise or trade-off at all. It's about breaking right through the seeming dichotomies, and creating a new and meaningful offering that the marketplace sees, often immediately, as such.

Interestingly – think of the Easy Button - we might think, “Aha! That’s spot-on. Why didn’t I think of that!” The truly innovative is often self-evident once it happens, and this goes a long way toward inspiring and uniting an organization, and aligning efforts to carry forward the success.

### ***Jazz, TRIZ, and Other Routes to Breaking Through***

The idea of actively managing innovation isn't new. Peter Drucker, arguably the father of modern management and an author who wrote about business for sixty years, felt that innovation could be presented as a discipline, much like Quality Improvement or Supply Chain Management, and that it could be learned and practiced. “Entrepreneurs need to search purposefully for the sources of innovation, the changes and their symptoms that indicate opportunities for successful innovation,” he wrote. “And they need to know and to apply the principles of successful innovation.”

Companies have sought and found various ways to spark the innovation process, including unusual ones. Michael Gold, Ph.D., developed *Jazz Impact* to inspire business innovation through jazz. Jazz is characterized by constant change and ongoing improvisational response to change, collaboration, tension, harmony, resolution, and evolution, and it has the ability to engage and inspire. In the view of some, jazz evolves and thrives through the very same skills that companies need to innovate and break through. *Jazz Impact* has worked with such companies as: Starbucks, General Mills, Cargill, Carlson Companies, Best Buy, Accenture and IBM.

Another, entirely different approach to inspiring and managing innovation is known as "TRIZ" (pronounced “trees”), an acronym for the Russian phrase that stands for “Theory of Inventive Problem Solving.” TRIZ was developed in the former Soviet Union in the 1940s by Genrich Altshuller. Altshuller conducted an extensive study of practical inventions with the intent to formalize a universal set of principles that characterize innovation.

TRIZ research has continued over the past six decades, and over 2 million patents have been analyzed to surface and round out this set of principles, and to thereby make innovation teachable as a discipline, and to make it manageable, and ultimately more predictable. Among the companies that have used TRIZ are Motorola, P&G, 3M, Samsung, Siemens, and Phillips – all cited on *Business Week*'s list of the 100 most innovative companies.

The TRIZ innovation process itself is intuitive, and follows the same four-part movement from definition (or inception) through resolution (or integration) that characterizes many successful frameworks. It progresses from visualization and definition of the problem; to understanding of how

your problem can be cast as a more generic problem, faced by many people in the past; to understanding how the universal principles or patterns for great solutions might be applied to your problem; and finally to pinpointing and integrating a solution into your real-world context.

### ***Innovation Management in Retailing***

It's one thing to identify and develop an innovative idea, and it's another thing to galvanize the energies and efforts of a far-flung retail organization to carry out the idea in its Marketing, Merchandising, and Visual Merchandising, and all the way to the stores, the web, and every point of contact with the customer.

Target (pronounced à la Française or otherwise) plays out its innovative underlying idea in a focused way. With its more upscale customer in mind, Target shuns Musak and announcements through a public address system. The aisles are wider, and the ceilings lower. Target's merchandise includes exclusive product lines and special editions acquired through deals with Apple, the Food Network, and various designers, and it is presented in a more appealingly way than at rival Wal-Mart. In playing out a brand, vocabulary also counts. So Target doesn't use the terms "customer" or "client" but rather "guest." Its employees are "team members" whose supervisors are "team leaders."

Retailers don't make widgets, at least not typically. They create relationships with customers, communities, the marketplace, employees, suppliers, business partners, and shareholders. So innovation in retail is less about resolving the kind of physical or mechanical problems inherent in product development (although there's often at least some of this); it's more about breaking through seeming conflicts in what customers demand to frame a winning value proposition that the marketplace has never before seen in quite this way. It's Staples' "Easy," the Polo lifestyle, and all that Tar-zhay evokes. Crystallizing this value proposition - and continuously playing out, filling in, intensifying, and evolving it - is the stuff of innovation management in retailing.

### **You still have time to make your GEMCON award submissions.**

The Global Electronic Marketing Awards have been given at GEMCON annually since 1994. Historically, the GEM Awards have recognized excellence in customer-specific, technology-enabled marketing on the part of retailers, manufacturers, and technology suppliers. The GEM Awards are sponsored by **Accenture**.



For more information, the award criteria, and the nomination form, please see our web site: [www.ogdenconsultants.com](http://www.ogdenconsultants.com)

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