

Personal Sales in German Web Offset Printing Companies - Framework for an Industry Specific Potential Analysis - Schedule for a Pilot Study

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The German Printing industry is facing a number of challenges due to changes in the use of media, stagnating budgets for media and changes in advertising. Various production technologies are available to manufacture a printed product. Hence quotes may show widespread price ranges motivating customers to compare suppliers intensely. In consequence customer loyalty decreases, urging printers to intensify acquisition of new customers and retention of existing customers at the same time. Due to limited resources printing companies may not be able to expand sales departments. Therefore a potential analysis of the current sales force may be the first choice for most companies. The purpose of this paper is to generate a framework for an industry specific potential analysis of sales representatives that can be used by managers of printing companies and by research teams. Based on available industry specific data, relevant sales issues such as sales organization, automatization, qualification and motivation will be discussed to generate the items for a leading pilot study.

Keywords:

Potential Analysis, Sales Representatives, Selling Capacity, Printing Industry,

The Current State of the German Printing Industry

All segments of the German printing Industry are facing a number of challenges. The most important segments are advertising (catalogues, magazines, posters, direct mail, annual reports) and publishing (newspapers, magazines, books, calendars, directories). The following paper will embark on the question of demand and supply in order to draw a general picture of the challenges that may impact sales activities.

The demand is on a downturn due to the digital revolution that has created many substitutional products such as e-books, online magazines, online directories, online catalogues, online promotion and so on. That affects printed publishing as well as printed advertising (BVDM-Jahresbericht 2011, p. 40). But still there are also some positive forecasts such as for direct mail activities (VDZ 2012, p. 9). A more or less stable demand shows up so far for content marketing i.e. custom publication (Schröder 2011, p. 13) and packaging materials (BVDM Jahresbericht 2011, p. 40). Another promising market segment seems to be the so called functional printing sector, in particular printed electronics. Electric conductivity of inks is used to create new products such as printed antennas etc. (BVDM Branchenbericht 2012, p. 21). But as a whole the German Printing industry need to understand that in future demand will further reduce due to changes in the use of media (Eden 2013, p. 7), shrinkage of the advertising industry in comparison with GDP (ZAW 2012, p. 11) and last but not least stagnating private budgets for media (Statistisches Bundesamt 2013, p. 19).

In terms of supply, German printing companies are facing substantial overcapacities. Rates of utilization are 80 to 85 % significantly lower than the industry as a whole (BVDM Branchenbericht 2012, p.7). EBT-Ratios in 2010 were 1,9 % much less than industry average (4,8%) (Eden 2013, p.16). In the past decade (2000-2010) employment decreased by 30% , as well as the number of companies by 30%. (Eden 2013, p. 19). Prices for printed products have been going down for several years and are therefore also an indicator for the challenges of sales people in this industry (Nicolay, January 2012, p. 26). Future perspectives may not change for the better because manufacturers of printing machines tend to improve their products further and this is likely to increase printing capacities further (Nicolay, 2011, p. 18 and 19). In addition several competing technologies are available for printing services, such as offset printing, gravure printing, digital printing etc. Therefore printers may participate in different market segments and may offer a variety of products. As a result there is often an intense competition for given products.

Technological choices depend on product types, quality requirements, lead times and budgets . Looking for the most suitable technology, quantities (product runs) are a crucial issue (Smyth 2003, p. 299 and p. 301).

Competing technologies are most relevant for sheetfed offset printing, webfed offset printing (short: weboffset printing) and gravure printing. Weboffset printing companies are facing an extremely difficult situation: Having smaller product runs they are competing with sheetfed technology (Rehmann 2007, p.44), having larger product runs they have to argue against gravure printing (Zeindorfer 2011, p. 16). With respect to quantities there is a range with limits on both sides. Catalogues and magazines are typically affected hereby and therefore mentioned as example in printing literature (Smyth 2003, p..304). Competition occurs, when customers do not have any particular quality requirements. Then print buyers may also choose weboffset printers using so-called coldset technology (Nicolay June 2007, p. 54). Coldset technology requires uncoated paper so that colours will be absorbed by paper immediately during printing processes without additional drying equipment. Coldset technology is mainly used for newspaper print. Newspaper printers employ presses providing a significant print capacity. As a result they are able to manufacture cost-efficient products. Because circulation of newspapers is decreasing in Germany - cessation of Frankfurter Rundschau and Financial

Times Germany have been two prominent cessations in 2012 - competitive pressure is likely to intensify in future. Newspaper printers may use their facilities to print inserts, flyers and other advertising materials (Cummings et al. 2009). To determine competitiveness of a weboffset printer it is also necessary to analyze machine sizes. An important measure is the pagination per revolution that may range between 8, pages and 96 pages. 32 page presses represent approx. 50 % of the entire weboffset capacities in Germany (Nicolay 2011, p. 14). In consequence, print buyers may need to take three or more different processes into consideration if they want to make sure, to identify the best printing company for their needs (Smyth 2003, p.304). It is recommended to revise contracts on a annual base, because printing technology may develop rapidly. Foreign printing companies intensify competition further, especially if lead times are sufficient to allow shipment to Germany on schedule. But as soon as printing of demand becomes an issue, international competition is less important. All these circumstances affect the buying behaviour of print buyers. Prices for the same product may differ 100 % and more depending on the technologies used. Moreover scalability of product features is limited (e.g. page numbers should be defined as 4,8,16,24, 32, etc., formats should be chosen according to sheet sizes or width of paper reels). Price ranges and discontinuities of features stimulate buyers to contact several suitable suppliers, in order to minimize their own risks. Budgets for web offset jobs are considerably high, so that print buyers are motivated to compare more suppliers than they do for other products. That behaviour puts even more pressure on suppliers. In consequence weboffset printers in Germany have got the least expectations concerning prices as the annual survey of Apenberg shows (Apenberg 2013, p. 9). It would be helpful, if attention of buyers could be drawn towards quality issues. But as long as literature recommends to focus on formal issues to identify the most suitable media, negotiating prices will be a top priority for buyers. According to the literature formal issues like reach, cost per contact, frequency and audience selectivity have to be used to define an appropriate media mix (Lamb 2012, p. 272 and p. 276). So many decisions have to be taken, that buyers have got very limited time to think about the effects of alternative paper qualities, binding methods and so on. So it is likely, that only few technical design patterns are used so far to create advertising impact or communication impact. Depending on the respective equipment technical alternatives could be different paper qualities, inks and coatings, finishing and binding methods and different logistic services. Th focus on a limited range of alternatives is a starting point for a standardized and automated buying processes. In the printing industry e-procurement has expanded during the past decade. For standardizable products such as flyers or business cards buyers may already find a great number of sheetfed online printers (Nicolay October 2011, p. 36). E-procurement solutions are attractive to cut purchasing processes especially for purchasing C-Items. These developments help to increase competition in the printing industry

Research Field

The description of the printing industry shows that sales activities are especially challenging for weboffset printing companies due to many alternative technologies and suppliers on the one hand and budget orientated buying behaviour together with tendencies to standardize products on the other. In Germany more than 50 companies have their own heatset equipment. Almost 30 German companies are member of EWA the European Web Association, approx. 40 companies may be defined as constituting for this industry segment. The number of employees ranges between 50 and 1000. Workforce of most companies counts between 100 and 300 (see table 2 appendix). In 2011 a total of 9746 printing companies employed more than 150.000 workers, the staff of 638 companies was 50 workers or more (BVDM Branchenbericht 2012, p. 15). With respect to sales force analysis web offset printing

companies therefore represent an important part of the whole industry. Sales departments may already distinguish between sales representatives on the one hand and job managers on the other. Job descriptions to be found at weboffset companies indicate a professionalization of sales activities. Position titles are e.g. Key-Account Manager, Kundenberater, Projektleiter. Departments are named New Business Development, Konzeptkunden, Auftragsteams and so on (Table 2, appendix).

The above mentioned circumstances define the major duties and responsibilities for sales representatives: Pressure on prices, entrance of distant competitors, many parallel enquiries, tendencies towards standardized products and the rise of e-business suppliers decreases customer loyalty significantly. Hence, acquisition of new customers and retention of customers are the main duties for sales people in weboffset printers.

Acquisition of new customers starts with a suitable qualification of prospective customers and is followed by forceful sales activities especially systematic cold calling (Dalrymple 2007, p. 87). Sales people have to create offers able to convince buyers by using target-selling, up-selling or cross-selling strategies.

Target selling here defines all activities which are able to convince new or existing customers to increase their quantities or to downsize their products so that the printing company is able to reduce prices. For that sales people need to know in detail technical alternatives that may save production costs.

Up-Selling takes place, if customers can be convinced to invest in additional, more valuable technical features in order to create e.g. better advertising effects. Relevant features could be paper quality, ink and coating, finishing and binding methods as well as logistic services (Smyth 2003, p. 8). Surveys which indicate the benefit of additional features are crucial instruments for sales people.

The purpose of cross-selling is to provide additional products or services to an existing customer. Weboffset companies could sell e.g. other printed products or digital versions of printed products such as catalogues annual reports or magazines.

All these activities require a direct contact with customers and sufficient autonomy to create ideas and to develop strategic concepts. Typically these activities have to be accomplished by sales representatives or line managers. Therefore the following statements focus on sales representatives only.

Having a definition of the most important duties now, it will be important to find out whether sales departments are able to accomplish their jobs or if they could increase their performance. With other words, a potential analysis should be carried out to discover outstanding (or unused) selling capacities. This survey will focus on existing sales departments only because profit rates are too low to motivate substantial investments.

According to Apenbergs 2013 forecast study, only 25 % of weboffset printers plan to invest significantly. Three quarters do not want to grow in 2013. as it is for the whole printing industry (77%) (Apenberg 2013, p. 7 and p. 9). These tendencies may also be applicable for human resource investments. Nevertheless for printers with unused capacities it could make sense to build up sales capacities. Therefore a brief look at average sales force capacities could be useful. An analysis of accessible websites shows that currently approx. three to eight percent of staff members are involved in sales activities. On average one sales representative gets support from two job managers. Sometimes two sales representative face one inhouse sales colleague, in few cases one sales representative is supported by up to five job managers (table 2 , appendix)

Figures of table 1 and 2 suggest that products and markets of weboffset printers determine the number of sales people. Printers of periodicals (such as magazines) seem to need much less sales capacities compared to companies relying on industry customers. Nevertheless it is wrong to generalize this without an in-depth information. Assuming that investments are not

likely for most printers, the following statements will refer to the discovery of unused selling potential of existing sales departments.

Proceedings for a Potential Analysis of Sales Departments

In the Literature e.g. Winkelmann 2008 many approaches and techniques already have been described how to measure performance of sales representatives and sales departments. These approaches may be classified in output based methods and behaviour based methods (Dalrymple 2007, p. 512). With respect to the main challenges sales representatives are facing in weboffset companies these methods show some limitations:

Output based methods such as turnover statistics, reports on new customers etc. are helpful if concrete targets are been defined in advance, e.g. lists with names of prospective companies. Then activities such as qualification of prospective customers may be assessed appropriately. But in medium sized companies (Winkelmann 2008, p. 638) with dynamic markets such as weboffset printers it is less likely that targets are to be defined in detail. This is because planning activities would require too much resources. That's why it could be more efficient to focus on behaviour based methods first. Assuming that profit margins are below industry average (EBT 1,9 % in the printing industry compared with 4,8 % in 2010 according to Eden 213) and assuming that there is little scope to start attractive incentive programs to motivate sales representatives the following issues should be part of a potential analysis:

- organizational structure (to relief sales representatives)
- automatization of primary sales activities (to relief sales representatives)
- qualification of sales representatives (to initiate training programs)
- motivation and attitude of sales representatives (to define suitable objectives).

Each of these issues are to be discussed under consideration of the main challenges, i.e. acquisition of new customers and retention of existing customers. The description of automatization and qualification issues includes specific challenges of target-selling, up-selling and cross-selling. Also motivational issues will refer to target-selling, up-selling and cross-selling as long as differentiation seems to be appropriate. The discussion of organizational decisions focuses on capacity losses. In consequence a detailed discussion of target-selling, up-selling and cross-selling requirements is not necessary here. Available surveys and accessible company data are to be used to describe the situation in the German weboffset segment. Based on these findings a framework for a questionnaire will be developed with head of sales as participants. The purpose of this paper is to provide all statements for a pilot study. The pilot study is designed to confirm relevance of all topics for weboffset printers and to check comprehensibility of questions. Also the pilot study should reveal time and effort that is needed to answer these questions.

Relevance is important to get the acceptance of interviewees later, comprehensibility is a necessary prerequisite for valid surveys and efforts should be reasonable in order to minimize missing values.

Analysis of Organizational Structures

At first its important to identify tasks, which are not part of the primary responsibilities of sales representatives as well as unnecessary multiple handling of cases. They reduce available selling capacities. To measure dissipation of sales capacities the following aspects are to be assessed: Degree of job specialization, size of teams, specialization principles (Dalrymple 2007, p. 250) and information flows.

Degree of Job Specialization

To get an overview, this has to be discussed with respect to sales representatives, inhouse sales and other departments. If questions are also part of the pilot study they will be characterized by quotation marks.

"What is the percentage of tasks dealing with qualification of prospects or dealing with activities along the sales funnel?" The lower the percentage the more capacities are wasted. To recheck this information the following question should be raised:

"How many working hours of sales representatives are needed for job manager activities?"

"How many working hours of sales representatives are needed for administration such as meetings and reports?" "How many working hours of sales representatives are needed for training on products, technology and sales skills?"

Which are the main tasks of inhouse job managers? "Do job managers have to cover other functional areas such as purchasing, production scheduling, prepress jobs, invoicing and statistical reports?" "How many working hours are needed for other functional areas?"

Is there a sufficient degree of generalization to avoid internal comprehensive questions so that sales representatives may focus on primary tasks? "How many working hours are needed to deal with internal comprehensive questions from other departments?"

Is there a sufficient degree of specialization to minimize internal shortcomings? If not, internal shortcomings may have to be settled with customers in time-consuming discussions.

"How many working hours of sales representatives are needed to settle internal shortcomings?"

Analysis of team size

What is the size of sales teams. Have managers got sufficient time for each subordinate to answer questions and to make decisions without delays? A detailed question could be: "How many working hours are needed, to get decisions and approvals of superiors?"

Is there sufficient management capacity to care for personal questions and needs of sales representatives?

Analysis of spezialisation principles

Are sales representatives able to cover all needs and questions of their customers or do they need to deploy other specialized sales representatives when presenting and negotiating? A concrete question is: "How many costumers need two sales representatives to get their problems solved?"

Analysis of information flows

Sales tasks may be characterized as processes to retrieve and to send information (Jäger 2007, p. 3). Flawless information flows are essentiel for briefing, specification of products, estimates, order processing and so on. Too many organizational interfaces create risks with respect to information flows. In consequence the degree of specialization should be low to minimize organization interfaces. On the other hand specialization is needed to ensure sufficient qualification and working experienc for appropriate results. Facing theses restrictions the main decision of management is how to define information flows. The respective question is as follows:

"Are customers allowed to contact internal specialists for operational tasks directly (maverick communication) or do they always have to contact their sales representative or a job manager (gatekeeper communication)?" With other words are information flows decentralized oder centralized?

"Using a gatekeeper approach, how many working hours are needed for gatekeeping functions on average?"

"How much information is lost at gatekeepers?" "Using inhouse sales members as gatekeepers how many relevant data do not reach sales representatives?"

"How many shortcomings and which shortcomings could be avoided having a fully automated information system such as a webshop?"

Dissipation of selling capacities might occur if self management of sales representatives is suboptimal. These issues will be dealt with later when discussing qualification and motivation of sales representatives.

Findings in table 2 (appendix) show, that sales departments most often use a functional specialization (sales representatives for acquisition and inhouse sales for order processing). Approx. 20 to 50 % of sales staff are sales representatives, 50 to 80 percent may be defined as job managers). Most often one sales representative gets support from two job managers. Span of control in German weboffset companies ranges between three and ten subordinates. Field crew teams are rarely staffed with more than five members.

As specialization principle for field managers most often a geographical approach is used. Sometimes industry specific or product specific approaches can be found. Companies using a product specific approach most often decide to define spezialized jobs for printed and digital products. Experts for production technologies are rarely to be found, e.g. for sheetfed offset, web offset or gravure printing.

Analysis of Automatization Potentials

Automatization of selling activities could also be a way to enhance selling capacities. In the printing industry digitalization of busines processes plays an important role. Digitalization may only cover small parts of the sales funnel, such as automated file transfers to improve order processing. But digitalization could also be used to create fully automated sales systems starting with product configuration and ending up with a comprehensive satisfaction analysis. With respect to sheetfed offset products such as business cards, calenders, files and posters customers may already find a great variety of online suppliers (Nicolay 2011, p. 38), thereas for weboffset products only few alternatives are available so far.

Digitalization in the weboffset business so far mainly affects order processing activities such as file transfer, data processing and pressready approvals (Heidinger 2008, p. 33). An automated product specification seems to be much more difficult due to the manifold production alternatives. Automated configuration of products is useful only when automated estimating functions are integrated into webshops. Due to these circumstances there are no reliable forecasts concerning automated selling in the Weboffset business. A comparison of personal and digital sales with respect to main responsibilities of sales departments as a whole may help to make predictions.

For the following comparison, elements of a cost-benefit-analysis serve as a structure:

Resources required for installation and operation,

resources required for advertising, and finally

chances of success with respect to target-selling, up-selling and cross-selling.

Resources required for Installation and Operation

For both alternatives - personal or digital communication - costs will depend largely on the diversity of product ranges. Automated digital solutions may only generate an efficient way to communicate if all possible product configurations are defined and and can be integrated in to an online shop. Dewitz 2009 (p. 75) describes this as print buyer-submitted digital assets to

populate a customizable document. Companies having a variety of technical equipment such as 16, 32, 64 page presses, sheetfed offset presses and so on would have to define a large number of manufacturing alternatives in advance. A personal sales team is able to work in a much more efficient way because sales representatives may only create offers on basis of sales talks. Increasing numbers of products and manufacturing alternatives will clearly favour personal sales. If customers require to generate individual e-procurement processes, similar questions occur. Then printing companies have to adjust their shops according to the requirements of these companies. On the other hand online shops have got one fundamental advantage: reachability for customers is not limited to office hours.

Resources required for Advertising

For both approaches it is necessary to discuss the resources that are needed to get the attention of prospective and existing customers. Personal sales staff may be used for advertising and marketing research activities, whereas online shops are just able to serve inbound enquiries. Web shops will always need additional advertising campaigns to address target groups. In the long run perspectives will improve for online printers, because little by little customers will switch their behaviour using active search methods with support of internet widespread services. Therefore domain names and key word decisions are crucial for all online shops (Walter 2008, p.50 and p. 106) and for online printers as well. So far domain names of online printers are referring to products like flyers, files, calendars etc. A large number of domain names already exists with respect to flyers: flyeralarm, flyerdedevil, flyerpara.de, flyergott etc (Nicolay 2011, p. 36). According to Nicolay (2011) domain names referring to print are also popular, partly using English expressions partly using German words. Domain names rarely refer to technological features such as weboffset or gravure printing. During their online search activities buyers also want to learn something about the reliability or trustworthiness of prospective suppliers. According to Zipper 2009 (p. 76) for online printers it is necessary to prove their reliability for example by showing reference customers, certificates, plants, buildings, technical equipments, staff members and so on. Estimating functions may also serve as part of trustbuilding activities. Finally with respect to trustworthiness literature recommends to care about usability of online shops and web pages. All these efforts will require a considerable amount of resources.

As already mentioned, acquisition of new customers and retention of existing customers is particularly important for weboffset printers. In consequence a considerable amount of resources are needed to get the attention of sufficient prospects. These circumstances favour again a personal approach for weboffset companies.

Comparison of Success Chances

Online printers seem to be most competitive if they focus on standardized products with a limited number of features. Core benefits of online printers are short lead times and competitive prices (Marquardt 2011, p. 38). Online printers have to focus on selected features so that customers may find cost efficient solutions with short delivery times only. On the other side, customers need to have considerable printing knowledge and flexibility if they want to save money. To find the best offer, they have to enter data into various shops and try out different product configurations, quantities, delivery times etc. According to Zipper 2009 (p. 69) customers with a large demand tend to define their own purchase platforms and invite suppliers to join as participant. Doing this it is worthwhile to integrate auction tools as well to get the best price.

Success chances for Target-Selling

The purpose of target selling is to convince customers, that an increase in quantity generates sufficient benefit to justify additional expenses. For that online printers suggest a limited number of production runs, based on ideal utilization of production facilities. On the other hand customers may not always be able to limit themselves to a small range of offers and quantities. This is a chance for sales representatives to suggest innovative solutions e.g. by combining two jobs.

Success Chances for Up-Selling

The purpose of up-selling activities is to make suggestions for additional features which may increase the communicative performance of printed products. For that sales representatives need to understand the messages customers wish to convey. Before sales people can start to select and define suitable features, they need to collect sufficient background information concerning customers targets, strategies and market environments. Personal contact seems to be the best way to retrieve background information.

Success Chances for Cross-Selling

For weboffset printers cross-selling strategies could include other printed products such as specialized advertising materials or electronic media such as online catalogues. Many Business-to-Consumer online shops such as Amazon enhance their offers based on former selling experiences. The suggestions are typically based on a large number of previous buys. Business-to-Business-companies often have a much smaller number of customers and projects. In consequence it is difficult to generate suggestions based on reliable statistics. So it will be difficult to build up in advance cross-selling strategies as part of an online shop in the case of weboffset companies. Keeping in mind, that buyers are responsible for considerable budgets when buying catalogues, magazines and inserts, it is likely that they look for specialized suppliers. That means cross-selling products of weboffset companies would need to compete with other specialized companies. Hence a general cross-selling product range offered in an online shop is not likely to be successful.

Qualification of Sales Representatives

Selling capacities depend very much on the qualification of sales representatives. Educational levels may serve as general measure, indicating the problem solving capacity of a person in a given area. Also it may describe the organizational capabilities of a person (e.g. project management). In a competitive environment both properties are necessary for the acquisition of prospects and the retention of existing customers.

Education level tends to increase in German weboffset printers, but it may be supposed that still less than half of sales representatives do not have a formal academic education.

The qualification of sales representatives tend to improve with additional working experience. Due to the complexity of manufacturing processes years may be needed, before sales representatives may start with useful up-selling and cross-selling activities. Moreover if years of service are low on average, often new colleagues need to be trained with corresponding consequences for selling capacities.

In Germany the average time of service is more than 10 years (Rhein 2010, p.3). Sales representatives change jobs much earlier, maybe because they have got the chance to get well acquainted with other companies while selling products and services. Sales representatives in the printing industry may change jobs less often, because most of them experienced have received a print or media orientated education.

According to Porter 2000 (p. 57) knowledge about technical alternatives, about communication effects and about business administration including logistics is essential for sales representatives in weboffset business.

In this context business knowledge helps to understand requirements and to generate suitable product features, technical knowledge helps to generate feasible solutions and to identify the best manufacturing processes.

Communication skills are necessary namely in foreign languages if international customers are part of the target group. Currently approx. 10 % of German weboffset companies are employing experts for international business (table 2, appendix). Another important communication skill is the knowledge of technical jargon. The acceptance of sales representatives depends much on the ability to specify an issue using clearly defined expressions.

Moreover methodological capabilities are required if sales representatives plan to start systematic target-selling, up-selling and cross-selling initiatives. Methodological capabilities help to structure complex issues and to ensure a systematic way to work on problems. To identify additional selling capacities that is due to limited qualification, a field research should be done, i.e. sales managers should be asked. For that it is useful to specify knowledge issues further.

A specification of technical knowledge should cover the following issues:

"knowledge about substrates with all its properties",

"printing technologies with different material flows (short grain and long grain)"

"finishing methods such as coating, folding etc."

"bookbinding alternatives",

"logistic services such as mailing requirements etc.",

"human perception and psychology (esp. optical and haptical perception)"

"market structures, marketing and advertising strategies",

"process optimization"

"general terms of payment and delivery" and

"buying behaviour".

(scaling for each item: basic knowledge, knowledge on average, comprehensive knowledge)

A specification of communication skills should cover the following issues:

Knowledge of English as a universal language, knowledge of target group specific languages. Knowledge of technical jargons with respect to printing technologies, customers industry, business expressions.

On a formal level - referring to the above mentioned information exchange - the ability to listen and to convey messages are to be considered:

Sales representatives using attentive listening and active listening are supposed to collect background information more precisely than other sales colleagues. The respective question could be: "Are sales representatives able to listen and to paraphrase the statements of customers?"

According to Schulz von Thun 2001 (p. 150) essential for conveying messages is the ability to tell the whole story, while maintaining a good structure, using simple phrases, avoiding redundancies and using attention-catching words.

With other words: "Are sales representatives able to send comprehensible messages?"

(scaling: basic, on average, above average)

The identification of methodological knowledge should cover the following issues:

The knowledge of decision making techniques might be a general indicator for methodological capabilities. "Which decision making techniques are sales representatives familiar with?"

As already mentioned methodological capabilities may be represented by the strategies how to retrieve and how to process data. For weboffset businesses main tasks are the identification of new prospects and selling products to all prospective and existing customers using target-

selling, up-selling and cross-selling opportunities. These activities require innovative and still customer orientated offers. A target orientated search for information includes:

"Appropriate identification of the relevance or redundancy of data".

"Target orientated systematization, grouping or sequencing of data".

"Active explorational search for data, if existing data seem not to be appropriate".

"Target orientated assessment and processing of data".

(scaling: basic, on average, above average)

As items for the general qualification level of sales representatives may serve:

"Level of professional education: academic, non-academic?" (for each sales rep).

"Subject area: print, media, others?" (for each sales rep).

"Years of service: less than 1,3,5 or 10 years, 10 years or more?" (for each sales rep).

"Age of sales representatives": (for each sales rep).

As indicator for prospective abilities the following question may be used:

"How steep are experience curves on average after 1,3,5,10 years of service? For each number describe the experience level as a percentage of the ideal qualification (10,20, ...100%)".

Motivation of Sales Representatives

In order to identify additional selling capacities the motivation of sales representatives should be assessed as well. General indicators for motivational problems could be an above average fluctuation of the sales staff. Another indicator may be the sick leave due to illnesses. Validity of both indicators is limited, because often other causes may play a role (e.g. private circumstances could require a change of location, change to part time work, shifting working days etc.). That's why information should be gathered directly, to identify additional selling capacities. For a survey motivational aspects should be further specified.

Dalrymple, Cron and DeCarlo emphasize on plateauing as a major problem as years of service increase. Due to their communication experience with customers, sales representatives know how to conceal a lack of motivation. Sales representatives are usually working autonomously experiencing only little supervision. That's why it is essential but also extremely difficult to measure lacking motivation and attitudes.

A motivational limit is likely to be existent, if sales representatives express indirectly little concerns when talking about single aspects of their job. This may affect single products, processes, target groups or customers. Similar as with objections during a negotiation, according to Jäger 2007 (p.189 and p. 190) these concerns may be expressed as follows: Relevance of issues, products or customers is too low (I have got other priorities...), success chances are too small (it never worked so far...), too many resources are necessary (too much time, money and so on) or responsibility lies somewhere else.

Most often these concerns are mentioned rarely and with respect to few issues such as underperforming products or weaknesses of the company. Later on concerns are more widespread so that planned innovations could be affected, such as the introduction of new products, entering new market segments, installing new technologies etc.

So the question to be asked could be as follows:

"How often are there concerns with respect to the job of the sales representative?"

"How many topics are affected by these concerns? (products, customers, competition, internal processes, competitiveness of own company, scheduled innovations, working atmosphere)"

Nevertheless such concerns may indicate a limited motivation, but they also could be an expression of real concerns and determination of a sales representative. That's why such concerns should always been put into a wider context. i.e. other aspects such as the real behaviour are also to be assessed before drawing conclusions.

So behaviour as a result of qualification, motivation, competences and market situation will be included here. Actual behaviour includes all preparations and activities of sales representatives along the sales funnel. In the context of unused selling capacities it is of particular interest to identify cases and activities that have not been accomplished. Due to the autonomy of sales representatives projects may be described as finished (by the customer), although there are still possibilities to pick up these cases again. On the other hand the number of self generated initiatives might help to draw conclusions with respect to unused selling capacities.

For that the identification of unused selling capacities should include the following issues:

"Frequency of missing cold call initiatives, having a successful prospect qualification"

" Frequency of missing enquiry initiatives, having a successful cold call"

" Frequency of missing offers, having a successful enquiry"

" Frequency of missing follow-up initiatives, having a successful prospect offer"

" Frequency of missing negotiations, having a successful follow up call"

"Frequency of missing follow-up orders, having a successful first order.

"Percentage of self generated cold calls".

"Percentage of self generated up-selling initiatives"

"Percentage of self generated cross-selling initiatives"

Performance of Sales Representatives

Finally the performance of sales representatives has to be analyzed before a waste of selling capabilities can be detected. For that overall profit opportunities of sales representatives have to be included as a bench mark. Benchmarks help to understand, if alternative activities would have shown better results. With other words. Did sales representatives choose the right thing? To assess profit opportunities the following target-performance comparisons should be kept in mind:

- Theoretical product range (including all features) vs. current market requirements,

- Theoretical product range (including all features) vs. current prospect / customer requirements,

- Range of current prospect/ customer requirements vs. current offers

- Range of current offers vs. current orders

To be able to assess sales representatives a differentiation with respect to sales districts is required:

"What are the current market requirements for each sales district?"

"What are the current customer requirements for each sales district?"

"What is the range of current prospect / customer requirements vs. current offers for each sales district?"

"What is the range of current offers vs. current orders for each sales district?"

The analysis of single sales districts allows to draw conclusions with respect to personal preferences of sales representatives regarding areas, branches, products, buyers and so on.

If (anticipated or real) profit margins for these projects are below average than it is justified to define these preferences as a waste of selling capacities.

Similar reports should be arranged for the autonomous definition of new target groups.

Range of possible market segments vs. qualified market segments

Range of qualified market segments vs addressed market segments

Addressed market segments vs. achieved market shares.

Settings of the Pilot Study

To validate these issues a pilot study may help to identify difficult questions and issues that may cause concerns due to wrong assumptions. So the participants of the pilot study should cover all different situations that a weboffset company could face:

Different machine sizes, different machine technologies such as sheetfed machines, different markets such as advertising and publishing, number of different business units, i.e. independent companies as well as companies with publishing partners.

A pilot study should address weboffset companies with reasonable size so that the number of sales representatives is large enough to recognize different performance levels, and not too large so that performance of single sales representatives can be remembered well. To reduce efforts only the two best and the two worst performing sales representative should be compared by sales managers.

Considering these aspects the following companies seem to be suitable to participate in a pilot study:

1. Stark Druck, independent printing company with more than 400 employees, having five presses ranging from 16 to 96 pages. In addition Stark has got a digital printing business unit. Its sales team comprises 5 sales representatives, 14 job managers and 2 more experts .
2. Bechtle Druck has got 108 employees and is part of a publishing house, Bechtle is having two 16 page presses. Newspaper coldset presses can be made available if necessary. Its sales team comprises 4 sales representatives, 2 assistants and 8 job managers.
3. Körner Druck, independent printer with approx. 200 employees, having four weboffset machines, presses ranging from 16, 32 and up to 64 pages. A sheetfed investment is planned. Its sales team comprises 7 sales representatives and 5 job managers.

Abbreviations

CS:	cold set (offset)
EBT:	earnings before tax
EWA:	European Web Association
GDP:	Gross Domestic Product
GP:	gravure printing
na:	not available
sales rep.:	sales representative
SF:	sheet fed offset (litho)

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Appendix:

Table 1: Weboffset Printers

Table 2: Weboffset Printers - Sales Force

Table 3: Weboffset Printers - Technical Equipment

Table 1: Weboffset-Printers (information sources: accessible company webpages)

Company Name	Internet	Abbr.	Part of a Publishing Group?
ADAM GmbH	www.adam-druckerei.de	adam-druckerei	
ADV-Augsburger Druck- und Verlags-GmbH	www.adv-druck.de	adv-druck	yes
alpha print medien AG	www.apm.ag	apm	
Appl Firmengruppe	www.appl.de	appl	
Brimberg Druck und Verlag GmbH	www.brimberg.de/	brimberg	yes
Becksche	www.becksche.de	becksche	yes
B&K Offsetdruck GmbH	www.bk-offset.de	bk-offset	
Bechtle Graphische Betriebe GmbH & Co. KG	www.bechtle-online.de	bechtle	yes
Brühlsche Universitätsdruckerei GmbH & Co. KG	www.bruehliessen.de	bruehliessen	yes
CW NIEMEYER DRUCK GmbH	www.cwn-druck.de	cwn-druck	
Dierichs Druck+Media	www.ddm.de	ddm	
	www.printtailor.de	printtailor	
Druckerei Vettters GmbH & Co. KG	www.druckerei-vettters.de	druckerei-vettters	
Druckhaus Haberbeck GmbH, Lage	www.haberbeck.de	haberbeck	
Druckhaus Kaufmann GmbH & Co. KG	www.druckhaus-kaufmann.de	druckhaus-kaufmann	
Druckhaus Main Echo GmbH + Co. KG	www.druckhaus-main-echo.de	druckhaus-main-echo	yes
Druckzentrum Hussmann		dzhussmann	yes
Eller repro + druck GmbH	www.dzhussmann.de/	eller	
Euro-Druckservice GmbH	www.eller.de	edsgroup	
Evers-Druck GmbH	www.edsgroup.de	evers-druck	
Niedermayr, Graphische Kunstanstalt GmbH & Co. KG	www.evers-druck.de	niedermayr	
GD Gotha Druck und Verpackung GmbH & Co. KG	www.niedermayr.net	gothadruck	yes
Graphischer Betrieb Henke GmbH	www.gothadruck.de	henkedruck	
Graphischer Großbetrieb Pößnek (Arvato)	www.henkedruck.de	gpp-media	yes
Gmähle-Scheel Print-Medien GmbH	www.gpp-media.de/	scheelmedien	yes

Company Name	Internet	Internet Abbr.	Part of a Publishing Group?
J.Fink Druck GmbH	www.scheelmedien.de www.hofmann- infocom.de/hofmann- druck	jfink	
Jungfer Druckerei und Verlag GmbH	www.jfink.de	jungfer-druck	yes
Konradin Druck GmbH und Heckel GmbH	www.jungfer-druck.de	konradin	yes
Körner Druck GmbH & Co. KG	www.konradin.de	koerner-druck	
Krögers Buch- und Verlagsdruckerei GmbH	www.koerner-druck.de	kroegerdruck	yes
Kunst u. Werbedruck Bad Oeynhausen	www.kroegerdruck.de	kunst-undwerbedruck	
MayrMiesbach GmbH	www.kunst- undwerbedruck.de	mayrmiesbach	
Mediengruppe Oberfranken Druckereien GmbH & Co. KG	www.mayrmiesbach.de	mediengruppe-oberfranken	yes
Mohn media GmbH (Arvato)	www.mediengruppe- oberfranken.de	mohnmedia	yes
Möller Druck u. Verlag GmbH	www.mohnmedia.de	moellerdruck	yes
Neef+Stumme Premium Printig GmbH + Co. KG	www.moellerdruck.de	neef-stumme	
OZ Druck & Medien GmbH	www.neef-stumme.de	oz-druck	yes
Parzeller Print u. Media GmbH & Co. KG	www.oz-druck.de	parzeller	yes
pva, Druck und Medien-Dienstleistungen GmbH	www.parzeller.de	pva.de	
Sattler Media Press GmbH	www.pva.de	wfw	
L.N. Schaffrath GmbH & Co. KG DruckMedien	www.schaupp- rollenoffset.de	schaffrath	
Schwäbisch Haller Industrie-Druck Schaupp GmbH & Co. KG	www.skn.info	schaupp-rollenoffset	
SKN Druck und Verlag GmbH	www.stark- druck.de	skn	yes
Stark Druck GmbH + Co. KG	www.schauffrath.de/ www.schaupp- rollenoffset.de	stark-druck	
Stürtz GmbH	www.skn.info	stuertz	yes
TSB Bagel Gruppe	www.vpm-druck.de	roto-offset.de/	
VPM Druck KG	www.vogel- druck.de	vpm-druck	yes
Vogel Druck und Medienservice GmbH (Arvato)		vogel-druck	yes

Company Name	Internet	Abbr.	Part of a Publishing Group?
VS Broschek Druck GmbH Walcker Offsetdruck GmbH & Co KG Druckhaus Weirich GmbH + CoKG Duisburg Wachter GmbH, Bönningheim	www.stuertz.de www.ROTO-OFFSET.de/ www.vpm-druck.de www.vogel-druck.de	broschek walcker weirich-medien wachter weiss-druck	
Weiss-Druck GmbH & Co. KG	www.walcker.de	westermann-druck	yes
Westermann Druck GmbH Westphal, Industrie- und Werbedruck Westphal GmbH	www.weirich-medien.de/ www.wachter.de	westphal-rollenoffset willmy	
Willmy PrintMedia GmbH WKS Druckholding GmbH	www.weiss-druck.de	wksgruppe	yes
	www.westermann-druck.de westphal-rollenoffset.de www.willmy.de www.wksgruppe.de		

Table 2: Weboffset-Printers - Sales Force (information sources: accessible company webpages)

Weboffset Printer (abbreviated)	Workforce	Sales Rep. (+Head)	Job Managers (+Head)	Assistance (+others)	Upgraded Job Descriptions or Department Names (usual descriptions are not mentioned) International Sales
adam-druckerei	140	5(+1)	13(+1)	4+1	Team Verkauf
adv-druck	280	8	6	19	Kundenberater, Projektabwicklung
apm	172	3(+1)	na +2	3	Konzeptkunden, Business Development
appl	800	1	12(+3)		/+Intl.
brimberg	na	na	na	na	
becksche	950P	4(+1)	12(+1)		Projektmanagement, Auftragsmanagement
bk-offset	>200	6	3	8+2	Auftragsmanager, e-Media
bechtle	100	4(+1)	8(+1)	2	
bruehlgiesen	<200*	3		7	Beratung
cwn-druck	120	5	9	2	Kundenbetreuer
ddm	200	5(+1)	14	5	Team Verkauf
printtailor	dto	1	4	1	
druckerei-vetters	<200*	5(+1)	5(+1)	2	Key Account Manager, Kundenberater
haberbeck	200+	7+(1)	4	5+?	Service + Print Kundenberater/Auftragsmanager/Intl
druckhaus-kaufmann	300	8	na	na	Vertriebsteams / + Intl.
druckhaus-main-echo	<200*	4	8		
dzhussmann	70	na	na	na	
eller	180	11+1			/+ Intl.
edsgroup	<100*	2	4	1+1	
evers-druck	400	23+33+10+3			"Verkauf und Beratung" / +Intl

Weboffset Printer (abbreviated)	Workforce	Sales Rep. (+Head)	Job Managers (+Head)	Assistance (+others)	Upgraded Job Descriptions or Department Names (usual descriptions are not mentioned) International Sales
niedermayr	<200*	na	na	na	
gothadruck	380	(2)		4	
gpp-media	1000	3(+1)	21	10+2	
scheelmedien	120	2	4		Beratung
hofmann-infocom.	na		2		
jfink	81	1	1	6	Kundenbetreuung
jungfer-druck	300	5(+1)	7		Kundenbetreuer
konradin	290	1	3	1	
koerner-druck	200	7(+1)	5		
kroegerdruck	na	2,5(+1)	6	1+0,5	
kunst-undwerbedruck	110		8		
mayrmiesbach	<200*	7	9		/+Intl.
mediengruppe-oberfranken	330	5(+1)			
mohnmedia	See gpp-media and vogel-druck				
moellerdruck	75	5	na+(1)		
neef-stumme	240	3	15	1	Auftragsmanager
oz-druck	170	na	na	na	
parzeller	210		3		
pva	200	na	na	na	
wfw	250	5	7		Key Account Manager
schaffrath	<500*	8	10		Consulting, Key Account Mgt. (Digital/Print)

Weboffset Printer (abbreviated)	Workforce	Sales Rep. (+Head)	Job Managers (+Head)	Assistance (+others)	Upgraded Job Descriptions or Department Names (usual descriptions are not mentioned) International Sales
schaupp-rollenoffset	na	na	na	na	
skn.info	<500*	na	na	na	
stark-druck	300	5(+1)	14(+1)	2	Neue Medien
stuertz	450	na	na	na	
roto-offset	900	1+1			
vpm-druck	190	4(+1)	7(+1)	1	Auftragsmanagement
vogel-druck	384	5(+2)	24(+2)	8	
broschek	33*	na	na	na	
walcker	100	3(+1)	10	2	Kundenteams
weirich-medien	>150	4(+1)			Beratung, Medienberatung
wachter	130	5(+1)			Medienberatung
weiss-druck	60	4(+3)		2	/+Intl.
westermann-druck	800P	7(+1)	6+1		
westphal-rollenoffset	80	4(+1)	3	1	
willmy	140**	na	na	na	**2001
wksgruppe	300	3	9(+2)	4	

* Information from other sources: web2cyclex.de; Wikipedia

Table 3: Weboffset-Printers - Technical Equipment (information sources: accessible company webpages)

Company (Abbr.)	Weboffset (Page Range)	Units (in total)	Other Techno- logies
adam-druckerei	16,32,48	4	-
adv-druck	8,16,48,84	7	-
apm	16,32	2	SF
appl		15	SF, GP
brimberg	24,32,48	3	SF
becksche	32,48	4*	SF
bk-offset	16	3	SF
bechtle	16	2	CS, SF
bruehlgiesen		Min. 1	CS
cwn-druck		2	SF
ddm	16,32	3	SF
printtailor		See ddm	
druckerei-vetters	8,16	4	SF
haberbeck	16,24	4	SF
druckhaus-kaufmann	16,48	4	SF
druckhaus-main-echo		1	SF
dzhusmann	na	na	na
eller		4	
Edsgroup (Kapazitäten im Ausland)		16	SF
evers-druck	18,16,32,40,80	8	SF

Company (Abbr.)	Weboffset (Page Range)	Units (in total)	Other Techno- logies
niedermayr	16,80,96	3	SF
gothadruck	16,32,48,80	7	SF
ggp-media		17*	SF
scheelmedien		2	SF
hofmann-infocom.	16	1	SF
jfink	16,48,64,72,80	7	-
jungfer-druck	32,48,80	6	-
konradin	16,32,48,72	5	SF
koerner-druck	16,32,64	4	-
kroegerdruck	16,24,32	3	SF
kunst-undwerbedruck			
mayrmiesbach	16	2	SF
mediengruppe-oberfranken	Up to 64	na	SF
mohnmedia	See ggp and vogel-druck		
moellerdruck	16,32	2	SF
neef-stumme	16	4	SF
oz-druck	32,48,72	5	-
parzeller	na	na	na
pva	na	2	SF
wfw	16,32,48	5	-
schaffrath	16,48	3	SF

Company (Abbr.)	Weboffset (Page Range)	Units (in total)	Other Techno- logies
schaupp-rollenoffset	16	2	-
skn.info	16,48,64	4	CS,SF
stark-druck	16,48,72,96	5	-
stuertz	na	na	SF
roto-offset	na	na	na
vpm-druck	16,32,48	5	CS,GP
vogel-druck	16,32	5	SF
VS-broschek	8,16,24,32	6	-
walcker	8-80	na	-
weirich-medien	na	na	na
wachter	8	1	SF
weiss-druck	32,48,72,80,96	8	CS, SF,DP
westermann-druck	16,32	3	SF
westphal-rollenoffset	16,32	5	SF
willmy	72	2	-
wksgruppe	32,48,64,72,80	8	-

* less than 4 colours