

The Power of Case Studies

What's a great way to brag about your work without coming across as boastful? Use case studies, which are real-life success stories about your business. Done well, case studies can be very powerful marketing pieces, because they provide a huge level of believability. Case studies bring your concepts to life, let your successes speak for themselves, and provide prospects with strong reassurance that whatever you're selling really does work.

Gain instant credibility

People like to identify with their peers. When I write case studies, I do so based on telephone interviews with your client, because being able to quote the person that you helped makes a case study even more powerful. This way it's not you saying your company solves problems and provides benefits. It's your customers who are talking about exactly how your company solved specific problems for them.

Plus, with this interview-based approach, instead of simply writing something like, "We helped ABC company substantially reduce their costs," your case study can feature direct quotes such as, "The impact of their work has blown us away. They slashed \$335,000 from our annual costs!"

There are three popular formats for case studies

1. **"Factual" format** – The "factual" format is usually presented under subheads such as "Background," "Problem," "Solution" and "Result." These case studies work because they explain, in a straight-forward way, how your company's products or services actually helped a particular customer.
2. **"Story" format** – Case studies written in a "story" format read like magazine feature stories. "Story" case studies work because they're interesting and emotionally engaging.
3. **"Hybrid" format** – This is my favorite because it combines the best of both worlds. These case studies tell a story, often using first-person quotes from the client who was helped, but present this story within the "Background, Problem, Solution, Result" framework.

Regardless of what format you use, the idea is not necessarily to present every little detail. Your goal is usually to tell enough of the story to get your point across, but not so much as to make the case study seem overly narrow.



Put your case studies to work

Where can you use case studies? In all of your marketing literature! Case studies can be effective in websites, brochures, press releases, newsletters, blogs, print ads, sales letters, proposals and more.

Everyone loves success. Don't be shy about sharing your company's success with your prospects and customers.

Source: Linda Coss, Plumtree Marketing, Inc., www.PlumtreeMarketingInc.com.

BUSINESS MANAGEMENT

MONA Payment Solutions Comes Through for PIA

MONA Payment Solutions, a merchant services and credit card processing company, has been a PIA Partner since 2018. During this time we've used them for our own merchant services needs, too. A recent experience served to reinforce why we continue to enthusiastically recommend MONA Payment Solutions to our members.

How MONA Payment Solutions helped us

"There's a payment button on our website that we wanted to change," says Kristy Villanueva, PIA Director of Member Services. "We wanted this button to automatically create a recurrent payment, on a schedule, but we couldn't figure out how to do this. We called MONA Payment Solutions and their response was, 'No worries. We'll take care of it for you.'"

"I gave Kristy a choice," recalls Meagan High, Relationship Manager at MONA Payment Solutions. "I could walk her through how to change that button. Or she could make me a user on their system and let me log in and do it for her, which is what she chose. I asked a few questions to ensure I set things up exactly the way Kristy wanted, and then I simply took care of it. Once the payment button was updated I did some research to ensure that the notifications that would go out to PIA members who used the button would be clear."

While Meagan was creating this button, she saw some other things that also needed to be updated or adjusted, and took care of these, too. When it occurred to us that we'd like to get notifications when someone pays online, Meagan saw to it that this was in place by the next morning.

"The way that MONA Payment Solutions helped us," Kristy affirms, "is exactly how we service our members. But there aren't a lot of companies that will pick up the weight and help you like that, which is why we're so particular about the groups we partner with. Our Partners are an extension of our Association. To make the cut as a PIA Partner, one of the most crucial criteria is that they must provide 'above and beyond'-level service to our members."

How MONA Payment Solutions can help you

"If there's something we can do to help a customer," Meagan shares, "we're happy to do it. As the 'middle man' between you and the huge credit card processing companies, we are here to help." For example, they can:

- **Fix issues with credit card processing terminals** – Instead of calling the processor's 800 number and being put on hold, call the customer support team at MONA Payment Solutions instead. For basic issues they'll walk you through troubleshooting steps. If that doesn't do it, they'll initiate the call with the processor, stay on the line with you throughout the call and ensure the problem is resolved.
- **Update bank account information** – "Because the processor deposits funds directly into the merchant's bank account," Meagan points out, "getting bank account changes quickly and accurately updated in the processor's system is vitally important. We fill out the paperwork and handle all the 'back and forth' with the processor until they confirm that the change has been made."
- **Negotiate rates on your behalf** – If you're not happy with the merchant fees that you're paying, MONA Payment Solutions can pull statements from the processor, see what you're paying and contact the processor to see if there's room to lower the fees. If the answer is no, they'll explore options with one of the other processors they work with.
- **Help you institute surcharge solutions** – "We offer both surcharge solutions and cash discount options," Meagan states. "We can help you determine if one of these is right for you, get it in place and even create marketing fliers about this for you that explain the program to your customers."

- **Deal with the aftermath of fraud** – What do you do if a malicious actor attacks your website with "card testing" software, generating credit card numbers in rapid succession until it either gets approvals or causes the processor to shut your virtual terminal down? If you're a MONA Payment Solutions customer you call them, and they'll deal with the situation for you. "For any type of fraud or chargeback situations," Meagan states, "we're the go-between between merchants and the processors to get it fixed."
- **Fill out annual PCI questionnaire** – Once a year all U.S. businesses that use merchant services are required to complete a PCI Self-Assessment Questionnaire, which is a statement of compliance with payment card industry security standards. "This can be very stressful for some merchants," Meagan has seen, "because of the technical nature of many of the questions. We can either walk them through this or handle it for them."

Even if you never contact MONA Payment Solutions with questions or problems, they'll contact you to complete an annual review anyway. Has any of your contact information changed? Are you able to log in to everything? Are you having any issues? Has anything in your business or business model changed such that your current credit card processing services are no longer the best choices for you?

Conclusion

"Merchant services companies often get a bad rap," Meagan observes. "MONA Payment Solutions is trying to change the narrative. Our goal is to provide hands-on, white glove service. You can come to us for anything related to your merchant services or credit card processing. If we can take that off your plate, we will."

To learn more, visit <https://partners.monasolutions.com/pia> or call MONA Payment Solutions at 805-418-7595.



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2024
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AWARDS

2024 DEADLINE: FRIDAY, FEBRUARY 23RD, 4:00 PM PT

Newly Updated Sample California Employee Handbook Now Available

If your business has employees, having an up-to-date Employee Handbook is a must. By clearly communicating your company’s rules, policies and expectations, your Handbook minimizes conflict and helps ensure consistent enforcement of your rules and policies. Your rules and policies, of course, must be in compliance with a myriad of constantly-changing federal, state and local laws and regulations. Creating and maintaining a comprehensive and compliant Employee Handbook can be a daunting task.

PIA has done the leg work for you

As a PIA member you have access to an incredibly valuable resource: the PIA Sample Employee Handbook. This comprehensive manual, which is written and updated by legal counsel specifically for California organizations of all sizes, contains:

- **Sample verbiage for a wide range of policies**, covering everything from “standard” issues that all organizations need to address, such as overtime pay, to optional issues that may not be pertinent to all organizations, such as background checks. To avoid confusion, optional policies are clearly labeled as such.

- **Editor’s Notes that provide context for these policies**, including explanations of associated laws, to help you understand how a given policy applies to your business. Once you finalize your verbiage for that policy you simply delete the Editor’s Notes.

Also available is a separate file that only contains the updates that were made this year. For those who keep up with the annual updates and don’t want to go through the entire sample Handbook to see what has changed, this document is a real time-saver. For example, changes for the 2024 edition include complying with California’s new sick leave and leave for reproductive loss requirements.

You can download the updated Handbook and/or the “changes only” file by logging in at www.piasc.org and navigating to the “Human Resources” section on the “Resources” page. Both documents are in Microsoft Word format to make them easily editable and customizable.

PIA helps you keep up with the changing legislative environment

In addition to the annual updates to the Sample Employee Handbook, PIA also provides:

- **Monthly legislative updates** in the Native.news publication.
- **Mid-year Sample Employee Handbook updates** if necessary to address major legislative changes. When this happens we send out a “For Owner’s Only” alert regarding the update.
- **Annual legislative updates webinar** presented by our lobbyist, and recorded for your convenience. If you missed this year’s webinar (which was on December 12), contact Nadine More at nadine@piasc.org for a link to the recording.
- **Annual legal updates webinar** presented by our legal counsel. This is usually scheduled at the beginning of the year when additional information regarding the new laws becomes available.
- **Extremely discounted pricing on legal postings.** These change every year. If you have not yet ordered your 2024 posters, which technically needed to be posted as of January 1, 2024, contact Emily Holguin at emily@piasc.org to do so now.

“There are many, many benefits to being a PIA member,” says Kristy Villanueva, Director of Member Services. “In this case, when you consider the potential costs of not having an up-to-date Employee Handbook or not remaining current with human resources-related laws – such as potential lawsuits, penalties and fines – it’s easy to see how these services represent another way in which PIA membership pays for itself”



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GOVERNMENT AND LEGISLATIVE

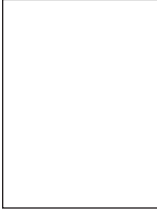
IRS’ 2024 Annual Limits on Qualified Retirement Plans & More

The IRS has announced the annual cost-of-living adjustments affecting dollar limitations for various compensation, benefit and contribution levels, including for qualified retirement plans.



The following chart compares some of the numbers from 2023 to those of 2024:

Item	2023 Limits	New Limits for 2024
401(k): Maximum employee elective deferrals to a defined contribution plan, including 401(k), 403(b) and 457(b) plans <ul style="list-style-type: none">• Additional catch-up limit for age 50+	\$22,500 \$7,500	\$23,000 \$7,500
401(k) & Profit Sharing: Maximum total annual contributions (employee plus employer contributions) to a defined contribution plan, such as a 401(k) or profit-sharing plan, or to an individual 401(k) or SEP for the self-employed	\$66,000	\$69,000
Compensation: Maximum compensation taken into account under qualified plans for benefit calculations and nondiscrimination testing	\$330,000	\$345,000
SIMPLE: Maximum elective deferrals to a SIMPLE IRA or 401(k) <ul style="list-style-type: none">• Additional catch-up limit for age 50+	\$15,500 3,500	\$16,000 \$3,500
IRA: Maximum annual contribution <ul style="list-style-type: none">• Additional catch-up limit for age 50+	\$6,500 \$1,000	\$7,000 \$1,000
Maximum earnings subject to Social Security Tax	\$160,200	\$168,600
Health FSAs: Maximum annual contribution <ul style="list-style-type: none">• Carryover limit	\$3,050 \$610	\$3,050 \$610
Qualified Transportation Fringe Benefits <ul style="list-style-type: none">• Transit pass or transportation in a commuter vehicle• Qualified parking	\$300/month \$300/month	\$300/month \$300/month



5800 S. Eastern Ave., #400
Los Angeles, CA 90040



Events
CALENDAR

Webinar – Collective Conversations #43: Enhance Your Safety Program & Culture
WEDNESDAY, JANUARY 17
10:00 - 11:00 AM PT
Online
bit.ly/3Rv6oun

Ben Franklin's Birthday Celebration
SATURDAY, JANUARY 20
10:00 AM - 4:00 PM PT
International Printing Museum
Carson, CA
bit.ly/FranklinsBirthday2024

Webinar – Bad Bots & Beyond: Shielding Your Organization From Modern Cyber Threats
TUESDAY, FEBRUARY 20
11:00 AM - 12:00 PM PT
Online
bit.ly/BadBots

1 January

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

FOR FULL LIST OF EVENTS, PLEASE VISIT WWW.PIASC.ORG/EVENTS

- **Print Excellence Awards Call for Entries Deadline**
FRIDAY, FEBRUARY 23
www.piasc.org/printexcellence/
- **Paper and Substrate Show**
THURSDAY, MARCH 28
5:30 - 9:00 PM PT
Irvine, CA
www.piasc.org/papershow/
- **Save the Date: Graphics Night**
THURSDAY, MAY 2
Yorba Linda, CA

IRS' 2024 ANNUAL LIMITS ON QUALIFIED RETIREMENT PLANS & MORE

HANDBOOK NOW AVAILABLE

NEWLY UPDATED SAMPLE CALIFORNIA EMPLOYEE HANDBOOK NOW AVAILABLE

MONA PAYMENT SOLUTIONS COMES THROUGH FOR PIA

THE POWER OF CASE STUDIES

Feature

Business Management

Human Resources

Government and Legislative

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Native News

PIA Services for Graphic Communications