

# How to Buy a Print MIS

Best practices in  
making an intelligent  
MIS purchase decision



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# Introduction

Most printers are very comfortable buying print equipment; they do that every year or two. They are less comfortable buying software – especially Print MIS systems, which are meant to be in place for 15-20 years. Changing MIS systems is a significant decision affecting every aspect of your operation, so it is something you don't want to do frequently. It is important to go about it the right way.

Avanti has been involved in Print MIS buying decisions every day for over 34 years, and we have compiled our expertise into some tips to help you navigate the Print MIS selection process and reduce your anxiety. Our goal is to help guide you on making the best decision for your print shop – whatever that may be.

## Why change Print MIS systems

Companies invest in Print MIS systems for a variety of reasons. Here are the top ones we see:

- Streamline and automate workflow
- Improve efficiency
- Increase capacity
- Minimize waste
- Reduce turnaround time
- Enhance business intelligence

The process of buying a Print MIS will impact your entire business for many years to come, so it should be well planned, thoroughly thought through, and backed by a process. Buying a Print MIS is about more than purchasing some software. You have an opportunity to look at how you run your business and to make changes where needed rather than merely automating what you do today. Switching Print MIS systems is more than a purchase decision – it involves change management.

Avanti has devised a structured Print MIS selection process designed to help you evaluate your business needs, identify your goals, pinpoint what software you need, and set realistic expectations for implementation.

This eBook will guide you through the following eight selection process steps.:

1. Understand your needs
2. List your key objectives and desired results
3. Build an evaluation team with a plan
4. Prioritize and verify essential capabilities
5. Scope software integration needs
6. Determine your budget
7. Select a vendor partner
8. Evaluate the implementation process

Bear in mind that you are embarking on a complex decision process. Review the entire, eight-step process before you begin. Then, we recommend going through the eight steps in order, although you may need to revisit some as your knowledge grows.



# 1. Understand your needs

It is necessary to do some internal research about your operation before you begin so that you understand your overall situation and why you need a new Print MIS system. We find that the people who are most satisfied with their Print MIS decisions are the ones who can see the big picture of how their new solution will help their business rather than those who merely upgrade an older system.

## Assess Your Current MIS System

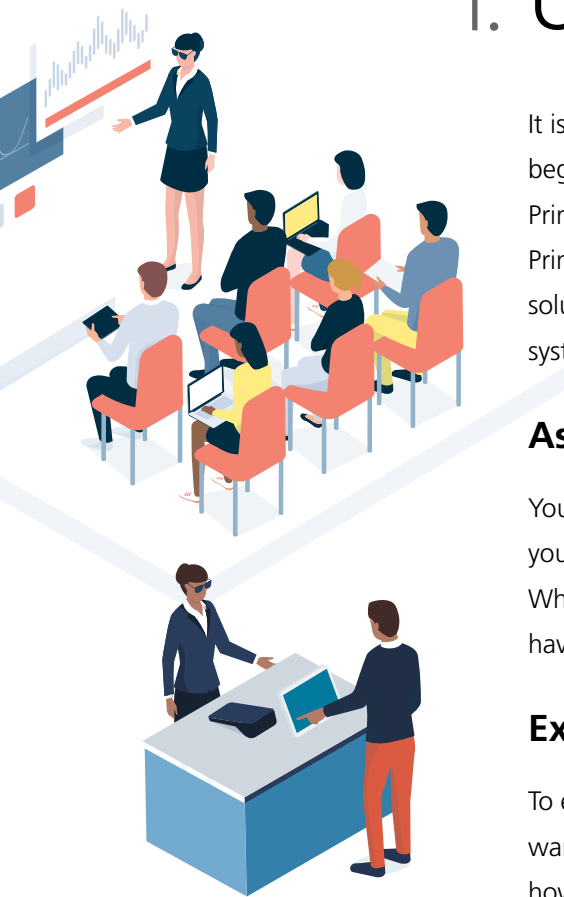
You already have a functioning business. Take a close look at the MIS system you are using to run it today. What works well with your existing software? What do you find to be awkward, frustrating, or time-consuming? What must-have features do you regularly use? What is missing?

## Examine Your Processes

To err is human, to completely mess things up takes a computer. You do not want to automate your existing problems! Look at how you handle work and how you can streamline your processes. Workflow processes often evolve from one person's habits or are workarounds to existing system constraints. You have an opportunity to change the way you work and to become more efficient. An excellent way to accomplish this is by performing a workflow analysis to identify every touch and the amount of time required for each task from order reception through shipping, billing, and reporting.

## Research and Benchmark

Understand the Print MIS options you have and ask similar printers or in-plants for their perspectives on their Print MIS system implementation, daily usage, and realized benefits. Printers are rarely shy in sharing their experiences implementing systems like these with their peers and will often happily tell war stories and provide advice.



## 2. List your key objectives and desired results

### THINK ABOUT THESE

Eliminate “islands of automation”

Grow volume faster than headcount

Increase Sales per employee

Reduce turnaround time

Reduce data entry

Reduce waste, errors, and rework

Reduce missed deadlines

Make CSRs more productive

Quickly find in-process jobs

Improve estimating consistency

Get invoices out faster

Get faster / better business reports

Understand profitability and causals

Now that you understand your existing processes and options get specific with your key objectives and how you will measure your success. Take a good look at your business and create a prioritized list of areas you want to improve. Here are some ideas to get you started:

### Capacity

Do you struggle to handle your existing volumes or to achieve delivery targets? Do CSRs scramble to answer customer questions about jobs? Do you have disconnected “islands of automation” in your workflow which aren’t delivering the results you expected when you automated? Look for these types of concerns and think of how a Print MIS system could help streamline and automate your workflow from order reception all the way through shipping and billing.

### Profitability

Do you understand job and customer profitability? Do you get invoices out quickly to minimize payment lag and improve cash flow? How much waste do you have from errors and rework due to miscommunications or data-entry mistakes? Do your analysis reports provide you the detail needed to hone your business? How long does it take to reconcile bills, generate management reports, and close every month? Consider how getting better information while streamlining these functions could increase your profitability.

### Growth

If you landed a major account with large numbers of orders, could you handle it? Does your headcount increase at the same rate as your growth? Are you more profitable at higher job volumes or do your costs increase too rapidly? Does handling an increasing number of smaller jobs impact your profitability? Will you be able to maintain your existing level of service to your customers as your volumes increase?

# 3. Build an evaluation team with a plan



Print MIS systems impact your entire business, so the selection decision should involve all aspects of your operation. You should have a project manager and build a core team who are actively involved in the decision process. It would be best if you also defined your extended team of subject matter experts at this time. These are the people who will be impacted by your decision.

## Select a Project Manager

Your Project Manager will be responsible for the operational success of the project, leading the selection process from beginning to end. Select a person who understands your entire business. The ideal candidate would have process improvement skills and should be respected across all departments. She or he does not necessarily need to be a technology expert but should be forward-thinking. The Evaluation Project Manager often takes on the role of Implementation Project Manager after the purchase decision.

Note that the suggestions below are for roles. More extensive operations might staff the core and extended teams with several people while a single person might assume multiple roles for smaller shops.

## The Core Team

- **Systems Administrator:** The person currently managing your Print MIS system or who will be responsible for maintaining it in the future
- **Operations Manager:** Someone who understands the existing production and delivery process and who can identify the needs and impacts a new Print MIS will have on them
- **Customer Service Manager:** Someone who understands the current CSR data entry and customer interaction processes and how they could be improved



## The Extended Team

A Print MIS system impacts all areas of your business. Make sure you have executive buy-in at the highest levels. Also, you will need to engage staff across multiple departments to ensure you cover all areas of your business which will eventually be end users of the software. Try to select people who are knowledgeable, respected by their peers, and comfortable with change. They will be your go-to staff for implementing change.

- **IT Representative:** Someone who understands your IT infrastructure and what will be required to integrate the Print MIS system into it
- **Executive Representative:** Someone who can ensure that the Print MIS selection will collect the data and generate the types of reports needed to drive business results
- **Departmental Representatives:** People who represent the process understanding and needs of various, impacted departments (e.g., Finance, Estimating, Shop Floor, Packing, Shipping, Mailing)

## The Plan

It should be evident by now that making a Print MIS purchase decision involves much more than merely shopping around. Your evaluation team needs to have a project plan to keep the decision process moving forward on time. Your project manager and their team will need to manage questions and answers, prioritize needs, account for bottlenecks, track progress, adapt to changing requirements, and ultimately make a purchase recommendation.

Selecting a Print MIS solution is not a short process and can extend indefinitely if not managed.



# 4. Determine your budget

## YOU SHOULD KNOW

Print MIS implementations typically involve a dedicated team of printer staff and vendor consultants.

Printers often require 6-9 months after going live to become entirely comfortable with using the software.

Print MIS systems implementations usually occur in phases throughout months.

Business needs change over time, which can require adaptations and extensions of the supporting software systems.

A Print MIS budget should include more than the price of the software. There are other elements under the surface to consider. Remember, this is a long-term investment, which you will likely use for the next 10+ years. As a rule of thumb, most printers budget two percent of revenue for software and implementation services. This percentage can vary based on your specific needs.

Be sure to include the following when creating your budget:

- **Software** cost
- **Ongoing software support** costs
- **Implementation** costs, such as dedicated staff time, secondary test systems, consultant services, and others
- **Infrastructure** costs. Consider your needs versus the costs of cloud-based versus site-hosted systems, such as long-term system updates and internal support staffing
- **Training** costs up front, and for ongoing management and CSR new hires
- **Business disruption** costs during implementation, primarily through the first year of operation

It is imperative to fully understand your total costs, including the opportunity costs associated with some of these options, before moving forward in the process of buying a Print MIS software solution for your print shop.

## 5. Prioritize and verify essential capabilities



Print MIS systems are sophisticated software solutions with a great many features and functions. Implementing all of them right out of the box will probably be expensive, complicated, frustrating, and time-consuming. Here are some better ideas:

### Prioritize What You Need

Work with your vendors to understand what their software provides and which features you need right now and in the future. Try to minimize your essential requirements but make sure you implement enough of a solution to have a positive impact.

Prioritize your requirements into three groups:

- **Essential elements:** The minimum set of capabilities needed to implement a useful Print MIS solution to meet your needs right now
- **Enhanced requirements:** The set of features which would help your business today, but which you will implement after the system is in place and running
- **Future needs:** The capabilities you expect to need in the future as your business grows and changes

### Verify the Solution

Bold claims and canned demos are easy to deliver. It is essential that you verify that the software can fulfill those promises in a way which fits with your organization's style and abilities. System operability is critical because your operators, CSRs, managers, and executives will be using this software for the next decade. You want to select a package which meets all your functional criteria and is comfortable to use.

### Map Features to Needs

Meet with vendors to carefully go through their software's capabilities and



understand which apply to your three groups of requirements. Ensure that they do meet your needs and that there are no gaps. Then get a demonstration of their system.

## Get Meaningful Demonstrations

The best demos are the ones that get beyond the generic 'canned' demos which each vendor has down to a fine art. Those demos are great for getting a feel for what a vendor has to offer, but remember that they all stress their system's strengths while avoiding weaknesses.

- **Create your own "demo script,"** which addresses your shop's requirements and processes. It should include use cases, sample jobs, and sample estimates. Such a script will allow you to see your data and how it will perform in the vendors' software. You want to see how it handles meeting all your critical requirements in the way you intend to use it. Vendors should be happy to work with you to develop your script, and you can use this demo script template for creating a one.
- **Schedule several online demos** early in your evaluation project plan additional, in-person demonstrations towards the end, once you have narrowed your search to 2 or 3 vendors. These demos will provide the information you need while minimizing time and effort. Also, always give the vendors your demo script in advance so they can ensure that everything is set up and ready. Your objective is to verify how their offerings meet your needs, not to trip them up. Pick examples which represent your everyday work, and leave out that one impossible job you do once a year.
- Maintain a "solution report card" to help rate each vendor and their software. Have all team members fill these out during each demo and share the results.

## Ask Your Peers

Listen to the people who already use these systems. Read the vendors' case studies. Ask for references with whom you can speak who are similar to you. Reach out to peers through professional organizations like IPMA, ACUP, PODi, or via social media groups like LinkedIn's Print Software: Web-to-Print and MIS, or Print Production Professionals, or In-plant Printer Forum.



# 6. Scope software integration needs

## SYSTEMS TO INTEGRATE

- Web-to-print
- Other job-acceptance
- Production automation
- Soft-proof approval
- External billing
- External reporting
- CRM
- Shipping
- Mailing

Every time someone touches a job adds time, cost, and potential errors and many of those touches occur where disparate systems meet. Typical examples of this include rekeying data from web-to-print systems, reentering job ticketing into presses or prepress systems, retyping delivery instructions into shipping systems, inputting data into billing systems, and there are many others.

Print MIS systems provide an overarching view of orders and jobs from reception through shipping. Thus, they are in a position to eliminate manual handoffs between islands of automation – but only if they are integrated.

Integration of multi-vendor systems can be challenging, and you should allocate time and resources to make it happen. There are some key questions to ask up front to minimize the required effort – and to ensure that it is even possible.

## Bi-directional JDF certification

Job Definition Format (JDF) is the printing industry's primary integration standard, defined and managed by the CIP4 standards organization. Be sure that your Print MIS selection is JDF certified and be sure that it handles bi-directional integration. Your Print MIS solution needs to be able to accept information from external systems and to send data to them to truly be integrated.

## Integration Experience

Ask each vendor for a list of the software with which they have integration experience. Sometimes vendors have software wizards, or prewritten XML files to map data fields and to speed the integration process. Even if they don't, a vendor with experience integrating their offering with the products in your shop will speed the process and reduce cost and frustration.

# 7. Evaluate the implementation process

## QUESTIONS TO ASK

- How many installations do you have?
- How long do implementations typically take from purchase to system launch?
- How long do companies typically use this software before everything is running smoothly?
- Who will be handling our implementation? What are their qualifications and experience?
- How do you handle unexpected, difficult implementation issues?

We understand that you are in the selection process and do not advise you to develop an implementation plan yet; however, implementation times and complexity vary significantly between vendors. So, we recommend taking some time to understand what will be involved regarding implementation before you buy.

## Transparency

No sales rep wants to stress the time and effort required to implement their product, but you cannot implement Print MIS systems with a quick installation program. This type of software ties into almost every aspect of your business, which will take time to understand, document, and code. Also, as previously mentioned, integration with third-party packages will require additional time and effort.

## Workflow Assistance

You have an opportunity to alter some of your existing procedures and become more efficient. Make sure the vendor you choose is willing and able to help you understand your current processes, identify areas of improvement based upon their experience, and adapt your methods to improve your efficiency – not just to make their software work.

## Implementation Tools

Be sure to ask vendors what specific tools they will be using for the project to ensure it runs as smoothly as possible. Check for software tools such as import utilities, quick start database, online videos and training guides for your team members post-implementation.

## ON YOUR SIDE

Have conversations with current customers of each vendor to discuss their implementation experience.

- How long did it take to launch?
- How long until everything ran smoothly?
- What went well?
- Where did they struggle?
- What do they wish they had done differently during install?
- What do they wish they had asked before signing?

Identify and engage the Implementation Project Manager and any other key people on your staff before the purchase.

- Do they have time to dedicate to this project for the next 6-9 months?
- How will this impact their other work?
- Does the implementation plan make sense to them?

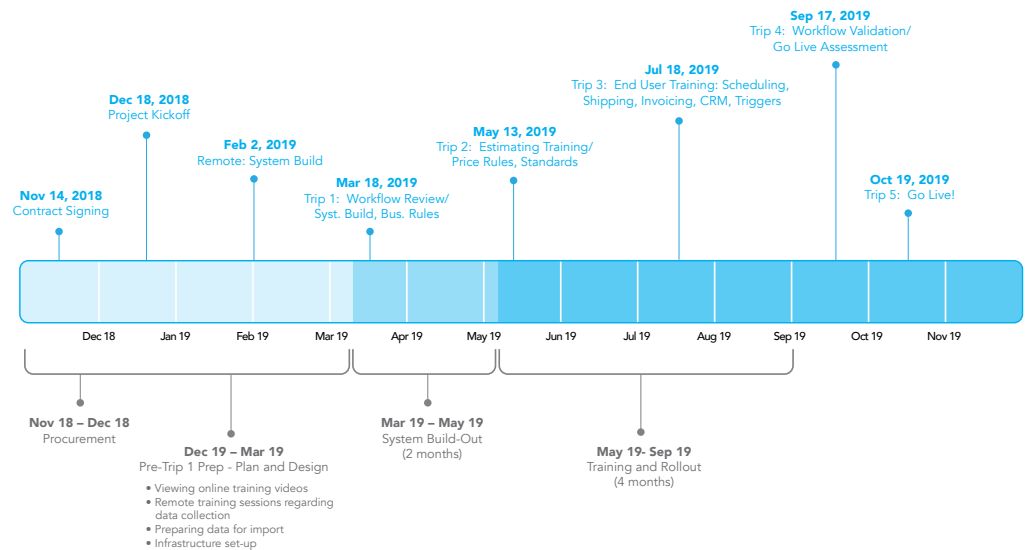
Be willing to tailor the software and your processes to fit your business needs – not just to make the system work.

## Implementation Project Plan

Ask to see a preliminary implementation project plan before you make your decision. Have them prepare this plan using your company's size, specific needs, and features rather than merely supplying a generic model. It will be a rough estimate before a full, post-sale analysis your particular details, but it should provide a reasonable approximation of implementation tasks and times. Look carefully at the following areas:

- The time between acquisition and launch
- The activities and their timeframes to make it happen
- End-user rollout activities and times
- Phased feature implementation schedule
- Expectations of your staff

Here is an example, benchmark timeline to use as a reference:



# 8. Select a vendor partner

## LOOK FOR

- Responsiveness
- Openness
- Answer Accuracy
- Helpfulness
- Ability to Understand Your Needs
- Easy Working Relationship

Selecting the right vendor is equally as important as choosing the right software, and narrowing the list of candidates will reduce your selection effort. You will be committing to working with this vendor for the next 10+ years, so ensuring a good fit with your team is vital. There are many questions you need to ask yourself when choosing a long-term vendor to partner with, but here are some useful qualifiers which might not be as obvious:

## Market Focus

The printing industry consists of operations providing a wide range of capabilities, each with their unique requirements. An effective offset estimating package does not necessarily work well for short-run digital, large format, fulfillment, packaging, or labels. All vendors will claim their products will work in all markets, but the primary market segments a vendor serves will drive their software development focus. You need to find a vendor who is active in the markets you serve.

## Added Services

It is easy to overlook a vendor's added services, but they are as important as the software. Added services can include customer service offerings, quality assurance promises, SLA's, and product training. Print MIS systems are complex, long-term solutions and expert vendor services can reduce the burden of managing them so you can focus on your business. Consider the services which matter the most for achieving your business goals.

Added services can also ensure that you will not be left in the dark if anything happens post-purchase. For example, will you have access to senior management and 24/7 support in the event of a breakdown to ensure your production process stays running? You should also check where a vendor's post-purchase support is located to avoid difficulties with time differences and language barriers.



## Adaptability and Growth

Print MIS systems need to be as individualized and adaptable as your business. Be sure that the vendor you select has a product which is flexible enough to meet your, unique need now and in the coming years. You are likely to expand or alter your business with additional volume, new offerings, and, possibly, new lines of business before you consider replacing your Print MIS system again. Be confident that today's decision will carry you through the next ten years without forcing you to implement unnecessary features today.



## Product Roadmap

Ask to see your candidate vendors' product roadmaps. What new functionality have they added over the past 12-24 months? What are their plans for the coming years? Are they expecting to be in a maintenance mode or are they continually innovating their product? What percentage of their annual budgets do they earmark for research and development spending? Are they appropriately staffed to adapt their offering to the ever-changing printing business ecosystem? Questions like these will provide you with an understanding of the commitment vendors have to address future needs and the direction in which they are moving.



## Vendor Longevity

Again, this decision has long-reaching consequences. You need to be confident that the vendor you select will be in business for the next decade. How long have they been providing Print MIS systems? How many installations do they have? What are their long-term business plans? Are they currently an acquisition target?

You want to do all you can to avoid needing to replace your software and start this whole process again because your vendor was acquired and the Print MIS product you purchased is phased out.



# Final Thoughts

## EIGHT-STEP PROCESS

1. Understand your needs
2. List objectives & desired results
3. Build an evaluation team & plan
4. Prioritize and verify capabilities
5. Scope integration needs
6. Determine your budget
7. Select a vendor partner
8. Evaluate the implementation process

## Your Responsibility

Vendors are experts on their products. It is your responsibility to understand your unique business procedures, plans, and needs. The best vendors will assist you in the doing this, but it is up to you to prepare and manage your decision process.

## Long-term Relationship

Print MIS selections are rarely buy-and-forget decisions. You should expect to continue to work with your vendor partner over time to enable additional features, acquire new capabilities, and update your system as your business and the technology evolve. A partner whom you find to be responsive, helpful, and easy to work with during the selection cycle will be likely to continue to behave that way throughout the years in your relationship.

## Change Management

Introducing any form of change can be challenging, with impacts far beyond selection and implementation. You will need to face user adoption and acceptance to change old habits, and there is always the pressure of meeting on-going customer needs. We believe that the benefits reaped from your investment will far offset these challenges if you have help.

Setting out well-defined goals, sticking to them, and establishing a team to lead this change will assist you in the process of buying a Print MIS. These will also facilitate a more straightforward implementation as the whole team will already be familiar with the software and the method, and can be proponents to the rest of the organization with their buy-in, expertise, and support.

We hope this eBook helps provide the first step the best Print MIS choice for you and your business. Avanti has been creating products which put our customers first for over 34 years, culminating in Avanti Slingshot, our award-winning, JDF-certified, print management software. And, we're just getting started.

## About Avanti

At Avanti, our goal is to help you deliver more jobs, in less time, with the confidence in knowing that every aspect of your shop is integrated into one, powerful platform. Since 1984, Avanti has provided innovative, award-winning Print MIS solutions that help print shops and marketing communication organizations automate all facets of their business and cultivate a more meaningful customer relationship. Avanti's solutions are the most open in the industry; JDF-certified, fully integrated, and extend from online order entry through to production and billing.

It is time to take the first step towards transforming your print shop today. Discover tailored Print MIS solutions for your business at [www.avantisystems.com](http://www.avantisystems.com).

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