

# How to Implement a Print MIS

A successful program starts with these strategies



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# Best practices for successful implementation

Implementing a Print MIS system is a significant undertaking, but that should not dissuade you from investing in one. Majority of Avanti customers report that they cannot imagine running their businesses without an effective Print MIS system once Slingshot is running. There are ways to reduce the time and effort required to implement a Print MIS system – regardless of the vendor you select.

Avanti has implemented hundreds of Print MIS systems for more than 34 years, and our Professional Services staff have worked on implementations which went well, and some which did not. This eBook provides guidelines to help ensure that your implementation meets your needs and is achieved in the shortest time possible.

## The 7-step implementation process

We have developed a seven-step implementation process to help guide you. This is not an implementation plan. It is a compilation of best practices we have seen companies adapt to streamline Print MIS implementations. The process breaks down into three phases.

### Preparation Phase

1. Set expectations and scope
2. Document objectives
3. Prepare support systems

### Planning Phase

4. Establish your teams
5. Specify your implementation strategy
6. Develop your implementation plan

### Implementation

7. Follow your plan

Your approach to each of these steps will vary based on your unique needs, and your implementation timeline will vary by the amount of effort you can devote to it. Following these steps, however, will ensure that your process runs as smoothly as possible.

## Beyond implementation

It is important to note that this eBook only covers the actual implementation phase of a Print MIS system. We will cover the equally important Go-Live phase in a subsequent eBook. The Go-Live phase includes elements such as:

- Launch readiness
- Launch
- Process mirroring
- Roll-out
- Additional implementation phases
- Ongoing training and enhancement



# 1. Set Expectations and Scope

Print MIS systems impact nearly every aspect of a printer's or in-plant's business operation. This has two implications.

- **Every Print MIS system implementation is unique.** Your implementation will be as unique as the way you run your business and will be driven by your order volumes, size, processes, objectives, and culture. There are no standard answers from an eBook or vendor consultant. Your senior staff will need to spend time using their extensive understanding of your business to determine how to incorporate this technology into your operation.
- **Implementations take time and resources.** Expect your implementation to require dedicated effort from some of your staff for nine months or more, depending on the complexity of your needs. This is primarily because Print MIS implementation requires making myriad decisions that will have cross-organizational impacts. Prepress, production, and printing staff will change the way they work. Front-office personnel will enter and find information in different ways. Back-office and executive staff will change the way they generate invoices, bills, and reports. All of this takes time.

So, be prepared to devote resources and about nine months to implement your Print MIS system. You should also consider reducing workload on key members of the implementation team. The rewards will be worth the investment.

## Establish reasonable goals

Print MIS systems have numerous capabilities and features. But remember that they do not need to be implemented all at once. Trying to implement and integrate every feature available in a Print MIS system right from the start will not only dramatically delay your launch, it will likely result in an inferior system. Implement the minimal, essential features that meet your core needs. If your organization has an existing MIS, begin by simply matching current functionality with the new system. This approach will get your staff learning and using your new systems and processes as quickly as possible. Once the initial phase is successful, begin to add other functions and integrate new features as you need them.

## Embrace change

A good Print MIS system should be adaptable to the specific needs of a printing operation. However, massively customizing a software package to conform with your existing processes will likely reduce its effectiveness. These packages are built by utilizing best practices from hundreds of printing operations. Be willing to alter your processes to leverage the power of the software.

## Current Workflow Mapping

A critical function leading up to the start of the project is Current Workflow Mapping. Your team must take the time to map all workflows in your operation. There are a numerous benefits to this exercise:

- It begins to get team members thinking about the business from a workflow perspective
- Assigning tasks to multiple departments will ensure no workflows are missed
- The output will give your implementer a clear picture of how your operation runs
- A solid understanding of your current workflows will help your team identify areas for improvement



## 2. Document Your Objectives



Sometimes the person leading the Print MIS implementation process is the one who made the purchase decision. Often, however, the implementation process is delegated to someone who was not involved in the selection process. Taking time to understand the underlying reasons for installing a new MIS system is time well spent for everyone involved. Documenting and sharing these objectives with every affected department will improve implementation, roll-out, and acceptance.

### Identify stakeholders and their expectations

- Who decided to purchase a Print MIS solution? What needs drove that decision? What results do they hope to realize once it is operational?
- Which departments will be impacted by the Print MIS system? What do they need from it? What are their concerns?

### Define Key Performance Indicators

Wants and needs are useful to know, but they are often difficult to quantify. Key Performance Indicators (KPIs) are data sets that measure, track, and determine progress on a project. They can be target dates, customer satisfaction scores, time savings, job or order volumes, profitability, or any other measurable items which align with your needs. The specifics will depend on your business needs.

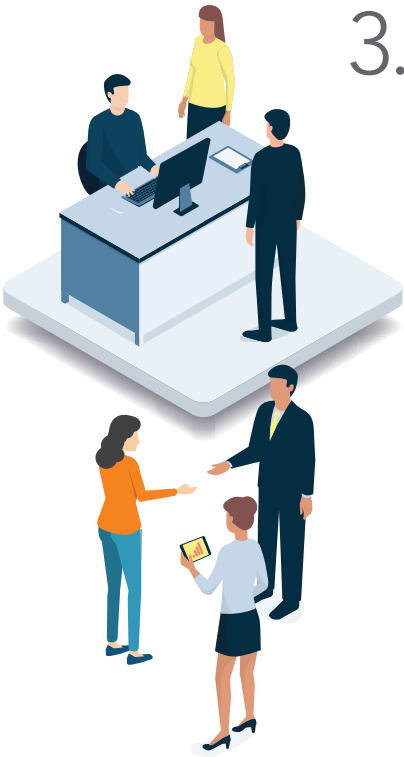
### Measure where you are now

KPIs are measurable and should contain target numbers, however, specifying targets can be challenging when the current situation is unknown. So, before you start, take some time to measure the relevant and current KPIs for your organization. Not only will this help you develop meaningful and achievable targets – it will help you measure the impact on your business.

**Suggestions for possible metrics.**  
**Please adapt this list to meet your own, specific needs.**

| Category                     | Measured Value Before MIS | Measured Value After MIS |
|------------------------------|---------------------------|--------------------------|
| <b>Time Savings</b>          |                           |                          |
| Order entry time/order       |                           |                          |
| Estimating time/order        |                           |                          |
| Customer support time/order  |                           |                          |
| Production time/order        |                           |                          |
| Finance/billing time/order   |                           |                          |
| <b>Customer Satisfaction</b> |                           |                          |
| On-time delivery             |                           |                          |
| Transparency                 |                           |                          |
| Pricing                      |                           |                          |
| <b>Responsiveness</b>        |                           |                          |
| Average turnaround time      |                           |                          |
| Percent on-time delivery     |                           |                          |
| Capacity                     |                           |                          |
| Monthly job volume           |                           |                          |
| Monthly print volume         |                           |                          |
| <b>Profitability</b>         |                           |                          |
| Monthly revenue              |                           |                          |
| Monthly profits              |                           |                          |
| Monthly expenses             |                           |                          |
| Prices                       |                           |                          |
| Waste                        |                           |                          |
| Billing                      |                           |                          |

# 3. Set Up Support Systems



Having your support systems and processes in place before diving into the implementation process will save time and reduce confusion. Most of the following steps are not challenging or time-consuming to set up, but having them in place will make it easier to do your work.

## **Establish a continuous quality improvement process**

Everyone should remain focused on the end goal and continuously move forward. The team should always welcome comments and feedback. Document, approve, save and distribute all decisions, customizations, and alterations. Plan to regularly summarize reports of progress, activities, barriers, or questions and share them among team members.

## **Document escalation and communication processes**

Define and document your communication and escalation processes. Knowing who has the answers and authority for various implementation decision areas will save countless hours trying to track people down later in the process. Single, or limited points of communication with your vendor and other key decision makers will minimize confusion and conflicting answers.

## **Implement a question/answer management system**

Your System Administrator will be spending considerable time ensuring that questions are directed toward the right people and answered. End users, team members, or your vendor can all produce questions and answers. Managing this can become quite challenging as the project grows. Unanswered questions can result in delays or mistakes. You might be able to handle this using spreadsheets and emails, but you might also want to consider implementing a slightly more sophisticated system. Some printers report success using the free version of Spiceworks Help Desk. Teamwork.com is another collaboration package worth considering.



## Use a separate system to test your progress

Think about who is going to test your progress and how they will do it. It's a good idea to create and use a separate or duplicate system and database for testing. This makes it easy to save, test, and restore a non-critical function, or try new software, techniques, and features without impacting business operations or live data. This approach is essential for the initial implementation and is extremely valuable even after launch. Your team can use it for thoroughly testing feature sets and software releases before rolling them out into your live operation. The investment in such a testbed system is a wise one.



# 4. Establish Your Teams



Setting up the implementation team is the most critical part of the implementation process. It involves three key elements, which must all be covered to ensure timely implementation.

- **Assignment.** Assign the right people to the tasks and ensure they understand their responsibilities
- **Time.** Allow them sufficient, dedicated time to perform their implementation responsibilities
- **Authority.** Grant them the authority to make necessary decisions

## *Assign the right people*

### **Vendor team**

Your Print MIS vendor should provide implementation support, training, consulting, and assessment of staff competence and proficiency. Their team should be highly skilled with their system and knowledgeable about successful implementation strategies. However, they will not understand the intricacies of your business.

### **Your team**

Your team members will be the experts on your operation and your business objectives. They will be responsible for configuring and building the system, validating all parts of your workflow, importing your data, and ensuring everyone on your staff understands their roles in using your new system.

The most successful vendor implementation teams contain the roles outlined below. Note that some functions, such as Project Manager, System Administrator, Power Users, might be covered by one person in smaller shops with fewer than ten employees, for example. It is, however, recommended that the Project Sponsor be separate from those detail-level assignments.

# Team roles



## Project Sponsor

The Project Sponsor is the top decision authority for the Print MIS project. She or he is often the senior-level person who made the purchase decision. The Project Sponsor is the executive champion for this project who ensures that it is moving in the desired direction, that necessary resources and choices are in place, and that the organization accepts cultural changes. This role involves active, daily engagement but it is usually best if this person is not managing details.

### *Responsibilities*

- Identify roles and responsibilities for team members
- Oversee the team's engagement
- Ensure team accountability
- Provide a single point of escalation for all team members
- Manage change and resolve resistance to change

### *Skill set*

- Broad business and operational understanding
- Executive authority



## Project Manager

The Project Manager does what the title implies. He or she is the person responsible for developing the plan, scheduling meetings, assigning tasks, and ensuring vendor and team members meet their deliverables. The Project Manager is the internal implementation manager who will dedicate a significant amount of time to this project throughout the process.

### *Responsibilities*

- Manage the overall Print MIS system implementation
- Coordinate installation, integrations, resources, schedules, and approvals
- Manage issues and risks



## System Administrator

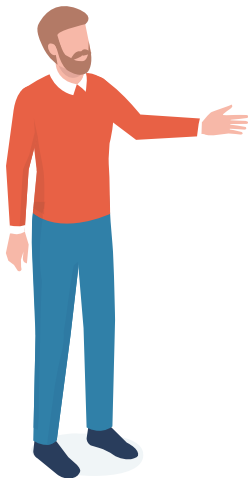
The System Administrator is not an IT position, despite its technical-sounding title. She or he is the critical person who makes the implementation happen. This person typically dedicates 75 percent or more of their time implementing the system and has the business, estimating, and operational workflow knowledge needed to make it happen.

### *Responsibilities*

- Internal Print MIS subject matter and application expert
- Devotes considerable (75%+) time to the implementation
- Continue in role past implementation to
  - Go-Live
  - Roll-out of additional modules
  - Focus on continuous process improvement

### *Skill set*

- Superior understanding of estimating
- Business rules and workflow knowledge from estimating to production to invoicing
- Experience in print production



## Finance/Accounting Representative

The Finance/Accounting Representative is typically your CFO or Controller.

### *Responsibilities*

- Lead team to validate and test all aspects of accounting and integration
- Verify that all registers, accounts, and transactions are working
- Create and revise Standard Operating Procedures (SOPs)

### *Skill set*

- Deep understanding and authority regarding all financial methods and systems



## Power User(s)

Your core team will need advice and assistance from one or more power users from areas such as customer support, finance, prepress, production, shipping, and so forth.

### *Responsibilities*

- Provide expert information and recommendations to the System Administrator
- Create and revise Standard Operating Procedures (SOPs)
- Supplement, support, and reinforce end-user training
- Participate in on-site training

### *Skill set*

- Expertise in their operational areas
- Respected by their peers
- Enthusiasm for change

## ***Allow enough time to do the job right***

The staff you assign to implement your new Print MIS system will need to dedicate weeks or months to this project. You can elect to purchase enhanced professional services from your Print MIS vendor or an outside consultant to assist with some of this. However, much of this time is specific to how your operation does business, which means that your staff members are the only ones with the answers.

Staffing demands will vary based on your specific implementation and business complexity, but here are some guidelines to consider:

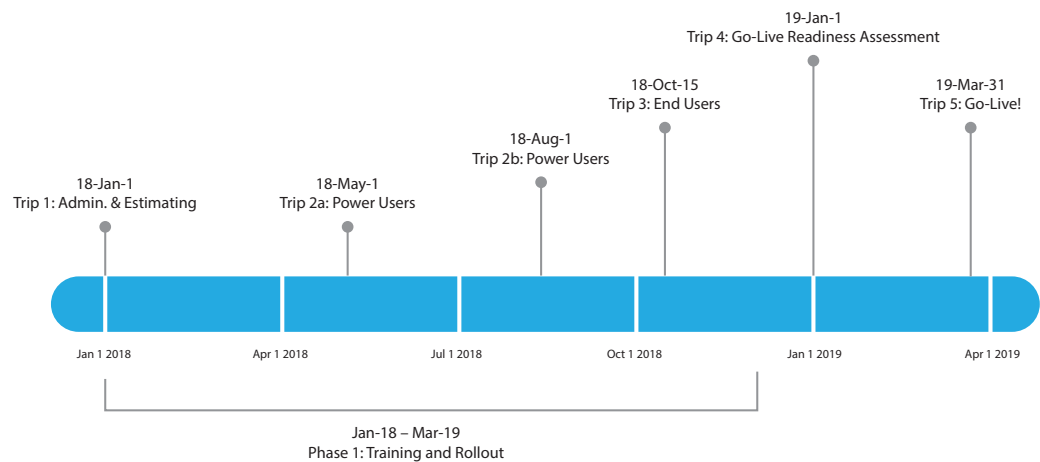
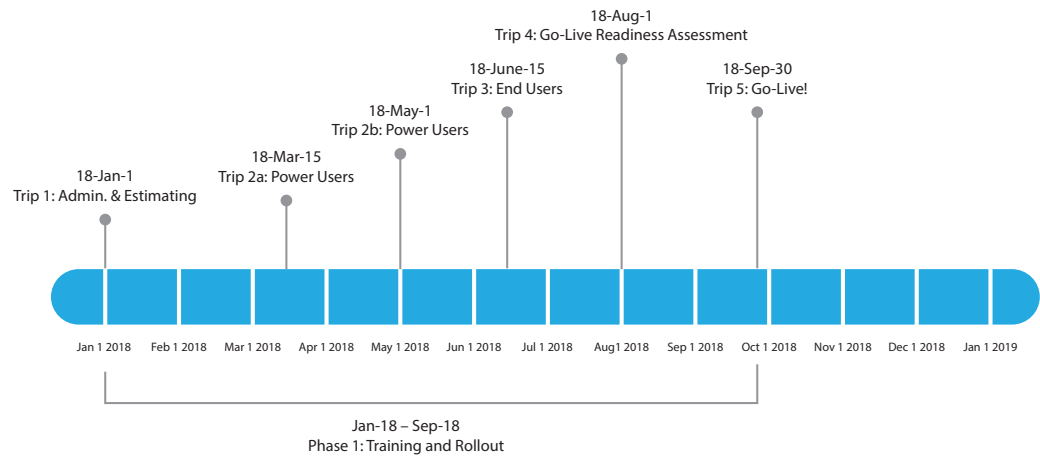
- **Overall implementation:** 40 to 50 weeks
- **Project Sponsor:** 1 to 2 hours per week
- **Project Manager:** 5 to 10 hours per week
- **System Administrator:** 30 to 40 hours per week
- **Finance/Accounting Representative:** 1 to 8 hours per week
- **Power Users:** 4 to 10 hours per week

Few commercial printers or in-plant printing and mailing operations have idle staff waiting to implement software systems. It is essential to have answers to the next two questions to ensure that your implementation plan is achievable:

- How will you handle the work these people currently do while they are working on this MIS project?
- How will you keep these people from being distracted by everyday operational crises?

Your answers to these questions will impact your overall implementation timeline. For example, a shop that can commit 100% of the System Administrator's time might be able to implement its system in nine months, while one that can only allocate 50% of the System Administrator's time might require 15 months. The answer depends on the availability of your resources.

The charts below are examples of timelines for staff training and roll-out of a Print MIS system. The timeline you adopt for your business must take your unique circumstances into account.





## **Establish clear authority for the project**

Implementing Print MIS systems involves a significant amount of internal decision making, which is one reason why outsourcing the entire implementation process is not feasible. Your team needs to have sufficient operational knowledge, business acumen, and authority to make decisions as they come up. Organizations that can make timely decisions will experience a much smoother and quicker implementation process than those that cannot. We recommend specifying three levels of decision authorization:

### **Authorizations**

Identify the types of decisions specific team members can make. Granting team member this level of authority speeds the implementation process and minimizes the time required from senior management.

### **Approvals**

Identify the types of decisions which must be approved by a senior executive. Ensure that senior executives agree to deal with these decisions within a few hours to a day.

### **Reviews**

Identify the types of decisions which must be reviewed or made by senior management. Ensure that there are a schedule and process for dealing with these decisions within a few days to a week. You might want to have a standing agenda item for them on daily or weekly senior staff meetings. Background information, alternatives, and recommendations should be presented in advance. Every effort should be made to ensure that these decisions are handled quickly and not tabled for future meetings.

## 5. Specify Your Implementation Strategy



The most successful Print MIS implementations involve phased roll-outs. Core capabilities are implemented, tested, launched, and used with additional features added with on-going roll-outs. Several factors drive this approach:

- People begin using the system more quickly rather than waiting for every element to be available
- Answers to difficult, theoretical questions often become apparent after experience with practical use
- Workflows typically change as your staff gains familiarity with the system, which can impact integration approaches
- Your staff will learn the system more quickly
- You begin capturing business benefits at the earliest possible time

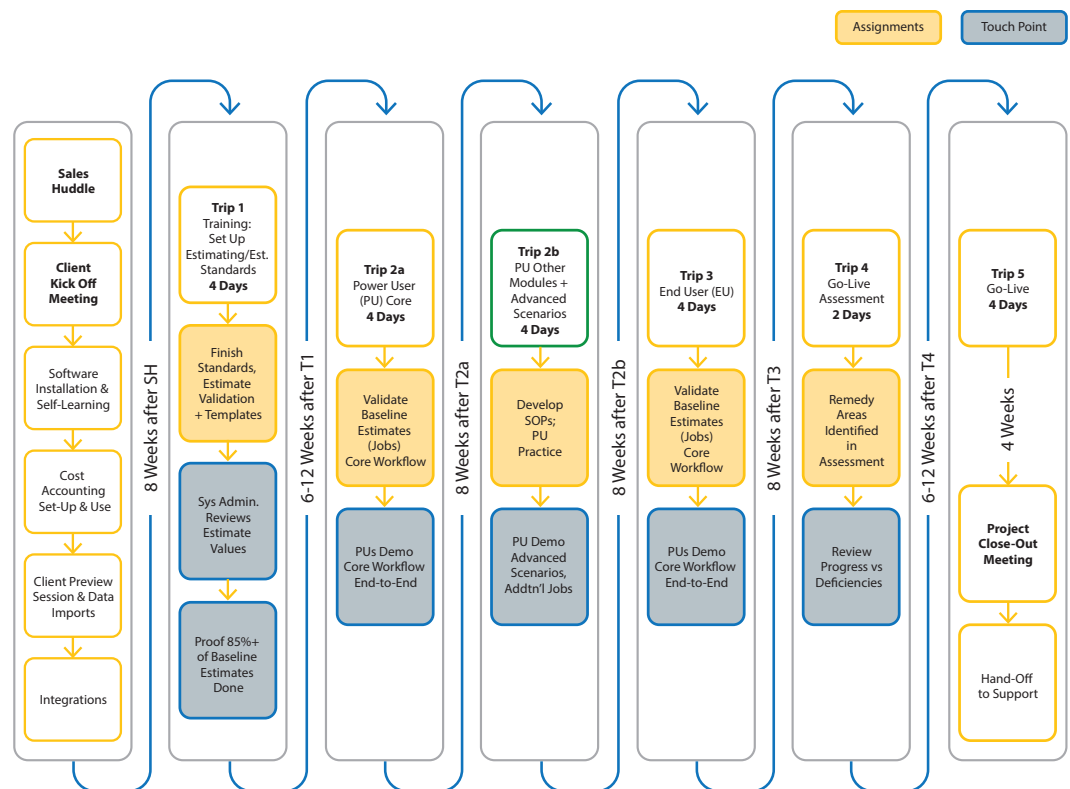
An implementation strategy should identify the minimum number of features and functions required for the initial launch, along with a series of planned roll-outs of additional capabilities. One of the most effective approaches is to start by implementing the capabilities of your existing system before trying to extend them with your new system's enhancements.



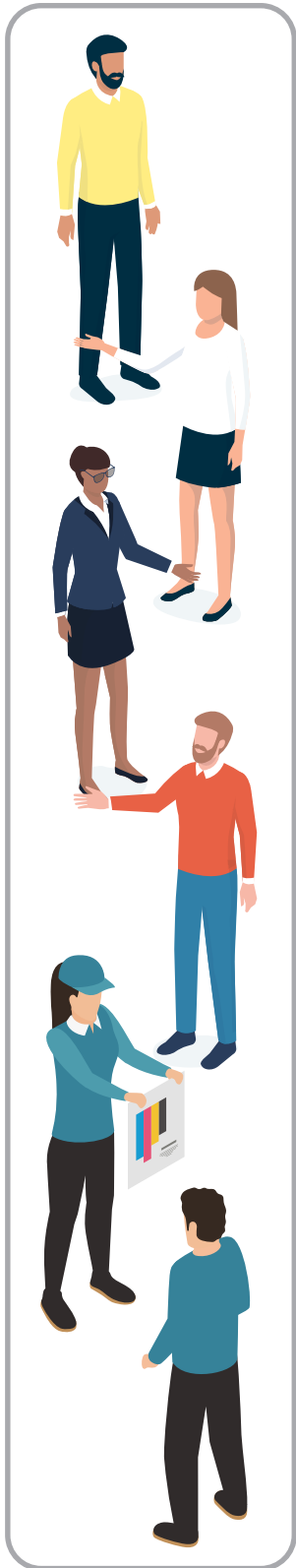
# 6. Develop Your Implementation Plan

Work with your Print MIS vendor to develop an implementation plan with assignments, touch-points, reviews, and dates. The diagram below provides a high-level example, but your implementation plan needs to be detailed and specific. It should include specific assignments and deadlines for all implementation areas, including:

- Business decisions
- Current workflow
- Standard operating procedures
- Templates
- Finishing standards
- Estimate validations
- Core workflows
- Integration requirements



# 7. Follow Your Plan



This step sounds obvious but is often ignored. Your Project Manager must hold your staff and your vendor to the deliverables and dates specified in your implementation plan. Emergencies arise, and critical orders come in every day, and it is common for deliverables to slide. It is typical for printing operations that stick with their plans to implement their systems in nine to 12 months. Print shops that don't follow their plans can take years to launch their Print MIS systems.

Your Project Sponsor and Project Manager are essential in ensuring that you follow your plan. A strong Project Manager will drive people to achieve their deliverables on time. A supportive Project Sponsor will ensure that this project receives the priority and support needed to succeed.

# Final Thoughts For Success



## Set clear expectations

Setting and meeting the proper expectations for time and resources at all levels of your company is vital to success.

## Develop a realistic plan

A team with clearly defined roles, responsibilities, and deliverables will minimize barriers and delays. Developing a realistic plan, based on your staff's availability will keep the implementation as smooth as possible.

## Stay on track

Having a Project Manager who will drive people to meet the plan and a Project Sponsor who correctly prioritizes the project will keep you on track. There will be constant distractions which will derail your implementation timeline if permitted.

## Go-Live

This document does not delve into the launch process. Our next eBook will cover that topic. However, it is essential to agree that Go-Live is not a date; it is a state of readiness. It is necessary to have a target date for going live, but Go-Live is dependent on:

- Correct software configuration and set up
- Sufficient team training and practice
- Your team's competency and its proficiency in operating all system features

## The Rewards Are Worth It

All this work will be worthwhile. Your operation will become more efficient with streamlined billing and tracking, and a better business understanding. Like other Print MIS users, you will wonder how you managed to run your operation before your system was in place.

## 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 and fully integrated, they extend from online order entry through to production and billing.

It is time to take the first step towards transforming your print shop?

Discover tailored Print MIS solutions for your business at [www.avantisystems.com](http://www.avantisystems.com).

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WE HAVE ANSWERS®

**Contact us today to begin  
your MIS journey**

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