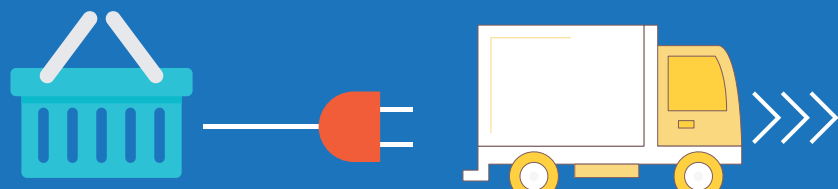


# Top Ten Time-Consuming Tasks You Should Automate Now

Actions you can take tomorrow to improve your print shop's bottom line.



avanti

WE HAVE ANSWERS®

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# Introduction

Let's face it, your business has fundamentally changed over the past few years. You now have dozens, if not hundreds of "micro" orders coming into the shop every day: short run jobs that your customers expect at a very fast turnaround time, often the same day. You know you can't touch a \$500 order ten times and expect to make any money. You hear the constant message to 'automate now', but struggle with where to start.

We understand that, which is why we put this eBook together. When it comes to automation, or any large change, the long road starts with those first small steps. To help set you on that path, we've put together a list of ten areas where your business can benefit from automation right now. Maybe all ten will relate to your business, or perhaps just a few, but the important thing is to give you a path forward, a place to take your first step.

We will use examples from print shops who have automated different elements of their business, sharing their experiences and the impact that automation has made for them. Beyond just identifying the top ten areas to automate, this eBook can help you:

- Identify and quantify what your manual processes are costing you, by illustrating how much time you could save per work day through workflow automation.
- Give you a glimpse into the ROI that automation can bring for your print shop, through increased revenue per employee, getting more jobs through with fewer touchpoints or through added revenue from introducing new lines of business.

***So, let's get started.***



# The top ten time-consuming tasks you should automate now

Automation of your entire workflow makes sense, to ensure you connect islands of automation, which can cause bottlenecks further down the line.

The following list works through the top ten automation tasks we have chosen, based on the print workflow process:

- |                       |                           |
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# Web-to-print

Currently, your customers may need to drop off their files, or send them through in an email, with a lot of back and forth communication needed to gather the necessary information for the order. Not only is this highly inefficient and time consuming, but it prevents you from taking on more orders which in turn, affects your profitability. Then, the challenge inside the print shop becomes on-boarding those jobs to get them into production.

You understand the value of web-to-print. Your web-to-print portal is your 24/7 communication vehicle to your customer; the key way to become “the print shop that never closes”. Customers can submit orders any time, night or day, from anywhere as well as check on the status of those jobs.

***With web-to-print,  
you are making  
it easier for your  
customers to do  
business with you.***

Fortunately, the customer has already done the “heavy lifting”; they have entered all the job details into the portal; description of the job (printing and finishing), quantity, substrate, special notes, submitted the file to print, and the shipping information.

If you go one step further and integrate your web-to-print platform into your Print MIS, this will eliminate the need to re-key all of this order information and, as a result, eliminate the risk of human error, saving time, speeding up getting jobs into production and, therefore, reducing overall turnaround time. Your team members will also be able to create consistent quotes, regardless of their skill level.

In an ever more competitive market, everyone is looking for tighter control of costs, so it makes sense to integrate web-to-print with MIS to drive efficiencies in a touchless workflow.



# Printing and Marketing Group's story

For almost two decades, family-owned business Printing and Marketing Group, Inc. (PMI) has delivered in-house printing, marketing, and mailing solutions.

*'On a typical day, we could get 50 orders between three storefronts. We average 1,000 -1,500 orders a month' - COO Armando Pena.*

PMI saw a shift in the industry to print on demand and realized that was where they needed to be to growing as a business. One of the biggest challenges that PMI faced was the amount of manual entry required to fulfill all the orders coming in, particularly through their online storefront.

PMI needed an open system that could communicate and integrate with their various web-to-print storefronts.

In the first three months after PMI automated their order on-boarding, they had already seen a reduction of errors in order input. Their order entry and shipping tasks saved as much as eight hours/day just in order input, tracking, and managerial jobs.

With the newfound hours, Armando and his team were able to focus on building the business, rather than simply getting jobs out the door.



# Estimating

In today's competitive environment, two things are key when it comes to responding to customer's request for quotes (RFQ): speed and consistency.

Customers are simply unwilling to wait for a reply to their request for quote. In many cases, whoever replies the fastest, gets the order. Quick turnaround is essential.

As for consistency, regardless of who puts the quote together, it is extremely important that everyone comes up with same number, uses the same estimating standards, includes everything required in the quote, and has access to historical information about what it cost to run a similar job in the past. That ensures you eliminate, as much as possible, the potential for human error.

The secret to getting that high-level of consistency is quote automation. In this case, that automation is in the form of templates. Most work is just a "variation of a theme". Templates ensure all tasks and materials are accounted for. It is imperative to have a system that supports different templates that cover all lines of business. The template requirements of a sophisticated offset job (ganging, plates, make ready, wash-up) are very different than short run digital (click charges, imposition), which is different from large format (wide variety of substrates, square feet calculations).

**The result:** Templates give you the opportunity to separate the "simple" work from the "complex" work. Automating the quoting process for the "simple" jobs means that tasks can be given to Sales Reps and CSR's to speed up turnaround time and potentially win more business. They will also reduce the effort of your estimating team so they can focus their magic on the more complex tasks.

*Added benefit:  
You will be able  
to provide quotes  
for many different  
types of printing,  
such as small  
format (offset,  
digital), direct mail,  
grand/large format,  
and fulfillment.  
This helps to open  
up new lines  
of business to  
generate additional  
revenue for your  
print shop.*



## Order Creation

As soon as your customer approves the quote, in their mind, the clock starts ticking. Your ability (or inability) to get the job on-boarded in a timely fashion will not change when the customer expects that job to be delivered – but it can seriously impact your ability to meet that deadline – especially if that order requires something to be purchased to produce the job.

*You need to input the job into your system as fast as you can, to give visibility to everyone that needs it: purchasing, production planning, and operations.*

There are multiple ways for an order to make its way into the shop: through your web-to-print portal, converting of an estimate, phone-in or email, even an excel spreadsheet. With the exception of phone-in or email, the on-boarding of all of these sources of new jobs can and should be automated.

Re-keying information already captured somewhere else slows you down and leaves room for human error. Which begs the question: what are you doing to eliminate email and phone as a way for customers to request quotes and place orders?





# 4 Material Planning

Have you ever been faced with this situation: A customer gives you an order and, upon accepting the order, you discover you don't have the necessary material needed to fulfill the job.

If your inventory falls below critical levels you are opening yourself up for trouble. In today's world where customers demand same day turnaround you need to stay proactive about ordering materials before you actually need them.

Of course, the other extreme can be even more expensive to the business: you order more than you require, just to make sure you never run out or because you aren't really sure what quantity you have on hand.

By automating material requirements planning, the system is aware of minimum levels, bare minimum levels, economic order quantities and leads times. You can then use that information to optimize inventory levels, monitor material requirements for orders in the system and automatically generate a purchasing plan for the given period (day, week, month). Finally, the system leverages the Triggers and Alerts system to instantly advise you of any "Low Stock Notifications" (NSN). The result is the perfect balance of having enough on hand to be able to say "yes", without having capital tied up in excess inventory.

***You should never let material planning get in the way of delivering a job on time again.***



# 5 Production Planning

Getting more jobs out on time is what it's all about.

The days of “ten jobs making their way through the shop in the next ten days” have been replaced with “ten jobs making their way through your shop in the next hour”. You don't have time to manually schedule and plan smaller orders and run the risk of it taking longer to schedule orders than to run them! You need orders, once on-boarded, to arrive automatically in a department's queue or run list for a particular piece of equipment.

However, not all jobs are created equal. Automating the run list of the “micro” jobs is one thing. For that, all you really need is an easy-to-use tool that can help manage the order in which jobs will run (i.e. quickly change the sequence of jobs to get several jobs out that are “stuck” behind a large, less urgent job, or to batch similar jobs to limit substrate changes).

More complex jobs need a more sophisticated tool – one able to manage finite capacity, automate the ganging of jobs, and allows production planners to play with “what if” scenarios. This provides you with the flexibility to adjust your schedule before locking and publishing it for everyone to see. When you automate this aspect of your workflow, you will be able to override schedules and change job priorities to meet shifting deadlines. The result is limiting “lateness” and maximize the number of jobs that get out on time.



## 6 Production Workflow

Often, the greatest challenge is getting your administrative systems (quoting, job ticketing, scheduling CRM, billing systems) to share data with your production systems (prepress, production and bindery equipment). Automating the sharing of information between these two types of systems can speed up throughput by eliminating the need to re-enter job information already captured elsewhere.

The key to success in this area is JDF (Job Definition Format): the common language that creates a seamless information and data-transfer link between your MIS software, key applications, and equipment.

What do you need to know about JDF? Nothing more than it gives any shop the ability to connect their “islands of automation”. It sends automated job instructions to a machine or software application which can then send production information back to update job status, collect costs, and adjust inventory, all in real time.



# Real-time Notifications

You have hundreds of jobs making their way through the shop every day. How do you know if something is off the rails? A lack of visibility can make you feel like you have a lack of control.

This is where triggers and alerts can make a key impact. Real-time triggers and alerts allows you to automatically send notifications to anyone (both staff and/or your customers) to let them know that something is ready for review, to be ordered or is off schedule. It could be an alert to let you customer know that there is a quote ready for their review and approval; that a job is running late and will miss a delivery date or will be over budget; that a stock item may need ordering and Purchasing needs to be alerted. There can also be a trigger so when an invoice has been completed, it is sent automatically to a customer or it can automatically send a shipping notification email to a customer the moment an order has been shipped – with the tracking number automatically included..

With automated triggers and alerts, you set the parameters that define the event, what action needs to be performed, and who the alert should be sent to.

Real-time notifications will help you to speed up your business processes and ensure everyone is kept up-to-speed and able to react – 24 hours a day, 7 days a week.

*“Avanti Triggers & Alerts module has been a delight to use. We leverage several of them: Automatic confirmation to the customer that we have received their order; Shipping alerting advising the customer when their order has shipped with tracking information. It is just like clockwork. It keeps us informed and up-to-date. It is a great communications tool.”*

*Joe Verardo, Print Production Coordinator, State of Oregon.*



## 8 Job Status & Costing

Given the sheer amount of jobs running through your shop, tracking jobs and their costs can be a real challenge. If you aren't capturing your costs, how do you know where you're making money and where you're bleeding dollars?

When a job ran for days, you didn't mind the manual effort required to track its status and the amount of materials used (paper, ink, etc.). However, you can't afford to invest the time to track "micro" digital orders – so most don't bother and just use the estimated cost as your actual cost.

However, estimated cost is exactly that – it is just an estimate of how long a task should take and how much material a job should use.

The only feasible way of tracking these "micro" orders is through automation. A Print MIS will allow you to automatically update the job status and costing by "talking" to your equipment. With automatic, real-time capturing of time and materials, a Print MIS will identify your costs down to the penny on every single digital job. With having this critical and accurate information right at your fingertips you, you will make much better business decisions.



## Shipping

Getting orders to your customers on time is a top priority. A late delivery can damage your reputation and jeopardize that relationship. In today's competitive world, you are only one late delivery away from your customer switching vendors.

Automation can significantly improve your on-time delivery via batch shipping and real-time integrations with numerous shipping courier providers such as UPS and FedEx. This completely eliminates the need for outside systems and the hassle of manually keying in hundreds of shipments.

By automating your shipping process, the system will automatically email shipping notifications and tracking details to your customers, ensuring they are always kept in the loop regarding their order status.

***If you can save one phone call into the shop per order, imagine how much time you will save overall.***



## 10 Invoicing

Getting invoices out in a timely fashion is the key to effectively managing cash flow. Every day you delay getting an invoice out the door, is another day you delay getting paid.

However, the time and effort required to get a \$50 invoice out is not much different than an order worth \$5,000.

With a fully integrated system and automation, the billing department will always have a list of jobs that are ready to be invoiced, whether they have been partially shipped, fully shipped or haven't had anything shipped, but is part of a contract you have with the customer.

Because invoices are automatically populated with order information and pricing created at the time of estimate or order entry, errors are greatly reduced and saves hours on administration. Also, depending on the arrangement that you have with your customer, the system can automatically generate a "batch" invoice that will include all the jobs shipped in a given period (say for an entire month) for the entire customer or one invoice per billing location. This can save you hours of work per month.



# Sull Graphics' story

For Bob Rottner, the CFO of Sull Graphics, the need to automate was all about reducing the number of costly touchpoints.

Their web-to-print system was an isolated island of information, with staff having to rekey orders into the order management system, and because the web-to-print orders had not been estimated, each one required review before being invoiced.

The resulting delay meant a corresponding delay in getting the invoice into the customer's hands. In addition to web-to-print orders, one administrator was tasked to create pro forma invoices and review cost information before the invoices could be sent to customers.

After automating and streamlining their invoicing process, each of his customer service reps could cut 15 hours out of their week by, firstly, having access to all their customer's jobs and information at their fingertips (instead of having to chase it down), and, secondly, by having all of the information that comes in with an order automatically appear on each invoice, as opposed to needing someone to re-input all the data.

Bob Rottner was able to drop his team's time spent invoicing from 13 hours/week down to just one hour. This efficiency alone translated into an annual savings of \$24,440.





# So, what's next?

If you can relate to any of the above tasks in your workflow, perhaps it is time for you to start putting a plan together to introduce automation into your operation.

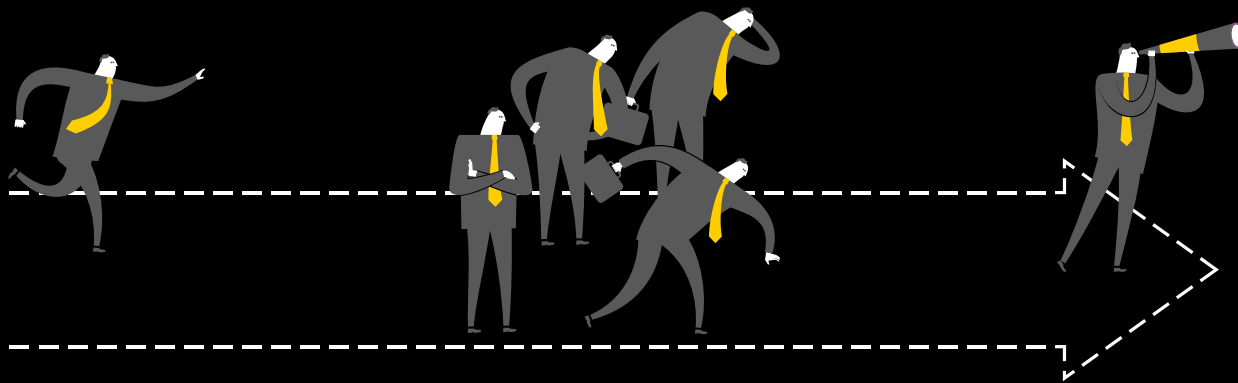
***“The journey of  
thousand miles  
begins with  
one step.”***

***- Lao Tzu***

In summary, automation of your workflow tasks will save you much more than money. Automation will help you to:

- Streamline the on-boarding of orders.
- Help identify bottlenecks that slow down your ability to get jobs out on time.
- Control the flow of work in process.
- Eliminate breakpoints in your workflow.
- Automate interactions with your clients.
- Help you better respond to a rush order or important customer requests.
- Notify Purchasing when inventory levels are low.
- Provide real-time business intelligence for better decision making.
- Better understand your print shop's costs down to the penny

***However, it can be daunting to look at this list and you may be wondering where to start.***



## Avanti can help you get navigate from "Point A" to "Point B"

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; are JDF-certified, fully integrated, and extend from online order entry through to production and billing.

It's 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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