

WhatTheyThink

# WHITE PAPER

## 5 KEYS TO A SUCCESSFUL PRINT ERP/MIS IMPLEMENTATION

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## Introduction

**S**election and effective implementation of a Print MIS solution is arguably one of the most important decisions a printing business will make. But it is certainly not a trivial decision – or a trivial task. That’s why it’s important to undertake this challenge from a position of knowledge, both about the current and desired states of your business and the options that are available in the marketplace.

In this white paper, we offer 5 Keys to a Successful Print ERP/MIS Implementation that are critical whether you are implementing a solution for the first time or are looking to modernize an existing implementation. As part of the research for this white paper, we spoke to four leading companies who have successfully gone through this process and are willing to share their experiences.

The 5 Keys to Success include:

1. Determine Clear Goals and Objectives
2. Do Your Due Diligence
3. Make Sure You Have Adequate Resources Available
4. Choose Partners that Are Flexible and Committed to Collaborating
5. Be Patient.

But first, let’s look at the definitions of ERP and MIS and the difference between the two.

- ERP, or Enterprise Resource Planning, according to Investopedia,<sup>1</sup> “is a process used by companies to manage and integrate the important parts of their businesses. Many ERP software applications are important to companies because they help them implement resource planning by integrating all of the processes needed to run their companies with a single system. An ERP

software system can also integrate planning, purchasing inventory, sales, marketing, finance, human resources, and more.” A more simplistic approach to defining ERP would be an MIS that has integrated accounting and/or a full financial module.

- Wikipedia defines an MIS, or Management Information System, as an information system used for decision-making, and for the coordination, control, analysis, and visualization of information in an organization and [in] marketing. ... In a corporate setting, the ultimate goal of the use of a management information system is to increase the value and profits of the business. This is done by providing managers with timely and appropriate information [about people, processes, and technology], allowing them to make effective decisions within a shorter period of time.<sup>2</sup>

The basic difference, then, is this: an MIS is used for the general management and use of information. It helps organize and store data collected from various sources accessible from a single interface and enables the creation of related reports. ERP is used to plan and automate business processes and uses a single database. Thus, in a sense, MIS is a subset of ERP. For purposes of this white paper, we will use the term Print MIS, although as you will see from some of the examples, an MIS can be extended through integration of third-party solutions to encompass the broader concept of ERP.

With that as a backdrop, let’s take a look at the 5 Keys for Successful Implementation of these systems.

### 1. Determine Clear Goals and Objectives

The first step in thinking about acquiring a Print MIS or upgrading an existing one is to clearly articulate what you hope to achieve. Vancouver-

based [Hemlock Printers](#), a diversified firm that offers offset, digital and wide format printing as well as distribution and fulfillment, set about replacing its legacy Print MIS which was no longer being supported by the vendor.

Richard Kouwenhoven, President & COO notes, “[In looking to replace our legacy MIS,] we had goals of integrating our estimating and job planning to our prepress department. We wanted to push JDF data integration across the workflow, including print and finishing. In order to have that level of intelligence in our processes, we knew we needed a new system.”

Missouri-based [Modern Litho](#) had a similar situation. While its legacy MIS, in which the company had invested a significant amount over the years, was still being supported by the vendor, Vice President of Operations Jim Tomblinson felt their current technology was no longer moving the company forward.

In a recent media interview, he said, “It’s human nature to settle for what you have when there is nothing better, and you just make it work. We did that for a good long time. But the reality is, we can no longer do business like we did yesterday. We have to be looking to the future. That’s what started this [search for a new solution].”

A key goal, which Tomblinson says was a dream of his for a long time, was to be able to connect his [Kodak](#) prepress solution with the MIS in a seamless, end-to-end process, across all five of the company’s locations. He also wanted an open system that would allow him to integrate other cloud partners into the overall solution.

Austin-based [ePac](#), now a network of 20 plants with 17 of them in North America producing flexible packaging on demand, was also looking for an open system. The company started with one manufacturing plant which was basically running on Quickbooks and Microsoft Excel but

had a vision of growing the organization both in number of plants and overall revenues.

Parag Patel, the company’s CIO, stated, “We wanted tight integration between prepress and print, but the number one thing for us was the ability to not only scale, but to be able to stand up a new plant system quickly. To do that, we needed to replicate the same system from plant to plant. We needed a solution that would give us the ability to see operational information in aggregate, but also granularly, at the plant level, and even to the department level within each plant.”

Vancouver-based [Canada Ticket](#) faced a similar situation as Hemlock, in that its existing MIS had been acquired by a larger company and was being sidelined in favor of other solutions in that company’s portfolio. “The vendor was still supporting it,” said Yann Saint-Laurent, the company’s IT manager. “But they were not fast enough in staying up to speed with technology, and it was really hard to find something that was a replacement.”

Canada Tickets produces virtually any style of ticket, tag or label required for a variety of markets, including but not limited to parking, transit, ski, entertainment, sporting & attractions.

“Almost every product we produce has an audit number, variable data or

security feature incorporated,” Saint-Laurent notes. Canada Ticket needed a robust solution that could be easily customized to capture the complexity of the work, which could include more than 100 descriptive fields per job.

All of these companies were thoughtful about their current situation and had a vision of where they wanted to take their operations. While their goals varied, what they all had in common was the desire to have an open solution that could provide them with a true end-to-end management system

*“They needed a system that could provide them with detailed, fact-based real-time and customized reporting that would help move their companies forward.”*

that could speed work through the process with as few touches as possible. They needed a system that could provide them with detailed, fact-based real-time and customized reporting that would help move their companies forward. They were all concerned with security of their data, as well, an especially critical factor for all businesses these days.

### Important Takeaways

- Many wanted a new system. Their existing Print MIS was obsolete or unsupported.
- Supporting their unique needs was important to each – but needs were different for each.
- Integration, customization, better workflows, scalability (support for growth) were common goals.

## 2. Do Your Due Diligence

All four of the companies we spoke to invested significant time in due diligence to make sure they understood what was available in the marketplace to meet their specified needs and to gather information about benefits they might not have thought of. In most cases, they spoke with or visited other customers using the systems they were investigating to get real on-the-ground feedback about functionality, reliability, implementation experiences and how well the businesses were supported, pre-sale, during the sale and post-sale. In some cases, this due diligence was performed over several years.

At Hemlock, for example, implementing a new software infrastructure came up on their radar as a priority starting around 2013 with a search for a web-to-print solution that would allow them to do business online.

“About two years later,” Kouwenhoven says, “we started our search for a replacement MIS because

we knew our legacy system’s days were numbered, and it wasn’t really being supported or updated anymore.” The company leveraged drupa 2016 to seek out information about available solutions, and while in Europe, visited some of the suppliers as well as some customers.

“One company that really stood out,” he says, “was a company in Copenhagen that was very much like Hemlock in size and offerings, including offset, digital and wide format printing, as well as fulfillment, all about the same scale as we had. They were long-time users of [PrintVis](#) the MIS that was in the top tier of those we were investigating. And we wanted to make sure if we decided to run the entire business on PrintVis, that we would be able to do that. Their experience indicated that was doable.”

“It was a volatile landscape at the time,” he says. “Companies were being acquired and, in some cases, subsequently closed down, which happened with one of our first choices during our first evaluation. It’s a million-dollar decision by the time you take into consideration the cost of the solution and the resources required to implement and maintain it. It was a transformative decision we didn’t want to take lightly.”

With the volatility at the time, Hemlock decided to sit it out for another year, and then picked up again with a different mix of five or so different systems to evaluate.

In its initial due diligence, Hemlock had contracted with a consultant who helped build a weighting system for evaluating the various options. The company was able to use that same weighting system in the second round of evaluations. “We had employees from each department weight the solutions based on how they affected their departments, with must-haves and nice-to-haves,” Kouwenhoven added. “We also needed a high level of confidence that whoever we chose would be around in five or 10 years.”

### Important Takeaways

- Hemlock in particular made a significant investment in searching for the right system.
- Selecting a modern system was important to all interviewed
- Choosing a system that was going to be around for “the long haul” was critical given past experiences of systems providers going out of business or being old and closed

## 3. Make Sure You Have Adequate Resources Available

These companies also understood that they needed to dedicate the right resources to a project of this magnitude. Staff who clearly understood their businesses and could ensure the implementation, in partnership with the vendor, would be more likely to produce a successful outcome. They needed a result that not only met the designated needs, but also was able to move forward with the company into the foreseeable future.

For all of them, it was important that every employee had easy access to all of the information required to efficiently do their jobs. They knew that, while the vendor was an important partner and brought deep knowledge of the system to the mix, their own staff was key. They needed their staff to be able to independently do as much as possible as new production technologies, for example, were added to their production platform, or other changing conditions occurred.

While they wanted a responsive, supportive partner, they also wanted to be as self-sufficient as possible moving forward. Engaging a team of trusted and empowered employees and departments in the selection and implementation

process helped them achieve this important objective.

They also dedicated thought and resources to change management – it was clear that implementing a new, more modern system was going to cause changes in the way people did their jobs. Sometimes it was a constraint of the system; other times, it was to improve the productivity and profitability of the operation with new processes and capabilities. That required teamwork and buy-in from everyone to minimize disruption and meet everyone’s needs.

### Important Takeaways

- Each company had a plan to deploy the necessary resources for the project.
- Remember that staff on a Print MIS project need to do their “day jobs,” too!
- Change management is part of any Print MIS project, so change champions need to be included on the project team.
- Choosing a system that their internal staff could maintain and continuously improve was also critical.

## 4. Choose Partners that Are Flexible and Committed to Collaborating – With You and With Third Parties

Each printing business is unique in its own way, and that means that its MIS implementation will also be unique. The one thing all four of the companies we spoke with had in common was the core MIS solution they chose, which was PrintVis. In all cases, a key deciding factor was the ability to customize the solution, including the integration of third-party solutions.

Another critical factor for them was the fact that PrintVis is built on top of [Microsoft Dynamics Business Central](#). Hemlock’s Kouwenhoven struggled in the due diligence process due to the

volatility of the MIS market prior to selecting PrintVis.

He stated, "In the end, PrintVis was selected because we had a higher level of confidence they would be around in five or 10 years. Because the system was built on a Microsoft platform, it moves with the platform and doesn't get bought by another company that wants to swallow it up into their system or by an equipment company that wants to have a focus on their equipment, which we have seen happen. We have seen larger companies try to put together components they have acquired into a single system, and that does not always work. Whereas PrintVis is still run by the founders, and they have a network of resellers that can provide local support and are Microsoft Business Central experts, such as [Sabre Limited](#), the reseller we work with. Having a North American company to support us is absolutely necessary."

For Modern Litho's Tomblinson, who chose PrintVis as part of a larger integration by Kodak, the Microsoft platform was a game changer. He says, "With a Microsoft partnership, along with our long-time partner

Kodak, all of a sudden the game changes for us, and started my thinking moving in a different direction. We always do our due diligence, and we looked at this hard. We decided that the time is now, for many reasons, but a key advantage is Microsoft offers hosting in one of the most secure places in the world. Very few companies put more investment into future technology than Microsoft. It changed our world and changed our thinking. I would tell you honestly, I would do it over again in a heartbeat. It's brought more advantages than I ever imagined and was a great move for us."

*"If the company you are working with is open to collaboration and committed to it and not just sending you a bill every time you have a conversation, it all works out well."*

For Modern Litho, another key element was the ability to integrate third-party applications into a seamless whole-of-company workflow.

Tomblinson adds, "When we are done with this implementation, we will have a true end to end solution. It's something I have pursued for the last 10 years to try to get partners to join and walk beside Modern Litho to create this, and we have just not been successful in getting that. Now that vision will become a reality."

Some businesses do minor modifications in their MIS implementations; others, like Canada Ticket, do major modifications. Saint-Laurent explains, "We are not really a label manufacturer or commercial printer. While we are a traditional printer, we focus on specialty markets, and no one had exactly what we needed. One candidate we were looking at, when we noted that the interface was not sufficient for entering orders, said, 'Oh, just put it all in a Word document.' That wasn't going to work. For order entry on one job type, we had over 100 fields in order to cover all the information needed to accurately produce the job!"

Based on past experience, Canada Ticket knew they would need to make major modifications to the system and initially chose the on-premise, rather than the cloud, version of PrintVis. During a recent upgrade, Saint-Laurent noted that Canada Ticket's customizations included more than 500 files and thousands of lines of code, adding, "Everything we have created is customized on top of PrintVis. It gives us a lot of flexibility to create new pages, new tables and extensions or

both. For example, if a standard case in PrintVis has 40 fields and I need 20 more, then I simply create a page extension that draws the fields from the table extension I created."

For Hemlock, its implementation focus at the moment is on integrating its XMPie storefront into

the overall system, improving imposition and layout efficiency, and using production data to manage schedules. In terms of layout and imposition, the goal was to set up JDF layouts in PrintVis with the pagination calculated with matching layouts in Kodak Prinergy and Preps.

“When we select the layout type in PrintVis,” Kouwenhoven explains, “we simply communicate that [automatically] to Prinergy and Preps, which drives a lot of other automation. We did a study in the last few months on the type of work we are putting through the system and found that 20 folded signature layouts account for 50% of our total layouts, meaning that these matching layout libraries between PrintVis and Prinergy/Preps can really increase our overall workflow automation.”

Hemlock’s wide format company, Prism Tech Graphics, will also be using PrintVis with a plan to go live this fall. Relative to PrintVis and Sabre, Kouwenhoven states, “They want their systems to talk to other systems. Maintaining that collaborative approach is critical; if the company you are working with is open to collaboration and committed to it and not just sending you a bill every time you have a conversation, it all works out well.”

For ePac, who had a substantial growth objective in mind, including replication of its systems across a growing number of plants, having an open system was key. “The most important thing to me,” Patel commented, “was it needed to be an open system, in the sense that we can integrate easily with APIs, not with EDI or flat files. That’s just not the way you do things these days. That was at the top of the list.”

Patel continued, “Second, I wanted an ERP that evolved on a regular basis. I needed a partner that evolves at the rate that most modern software companies evolve, not waiting two years to get a

new release. I also wanted something we could run in the cloud. When I came on board, the second plant was just being planned; and the discussion was that we were going to build a lot of plants. So how do we make sure we can support that growth with systems? These were the key factors in choosing the right ERP system and also understanding that whatever we put in place in the first plant would continue on to every subsequent plant. In three years, the machines might be different, the processes might be different, the packaging features we might create or provide might be different. So, we needed something that was flexible.”

Another important factor for ePac was the ease of replicating the system. “We have a specific way of doing things,” Patel says, “and we want all of our plants to use those operating principles. And once we are ready to go on a new plant, we want to be able to do so quickly and efficiently. The number one thing for us, related to scale, was the ability to quickly stand up a new plant system.”

*“I wanted an ERP that evolved on a regular basis. I needed a partner that evolves at the rate that most modern software companies evolve.”*

If we put our heads down, we can do that in a day in a country that is already up and running. A new country takes a bit longer because of localization, but even that doesn’t bog us down in months-long system configuration, testing, and deployment. We can do it all ourselves, replicating the same format. The only thing that might be different is the mix of assets in a plant and the number of assets depending on where it is being built.”

A key advantage for ePac in replicating the same operating principle across all of its plants is the ability to split orders across plants, either to produce closer to the point of need or to serve large customers without tying up a plant for days with a large order, as well as redundancy if there are issues in a specific plant, and to do so with consistency. “A key goal for us,” he adds, “is being

able to deliver quickly. Even before the pandemic, shipping from Asia could take eight to 12 weeks, and we deliver in 10 days.”

As an example, Patel cites the fact that a big box store might be willing to place an order with one of his customers if they can guarantee fast delivery. “Especially before the holidays,” he says, “a lot of brands don’t know what their big box customers are going to buy until the last minute. And they have to deliver quickly. We enable them to do that.”

Patel also notes that ePac is in the process of integrating an ecommerce environment into its operations that will give customers access to check order status, reorder, and place new orders, adding, “We believe this will change ecommerce for packaging. We are not just selling pouches; that’s not our goal. You can buy them online today. Our goal is to make it easier and more economical for customers to buy a quality customized solution, and that helps them succeed.

“With PrintVis and our other partners, we are solving a lot of complexity. If we didn’t have PrintVis and Microsoft Business Central, it would be very difficult to scale. You can very easily build a store for one plant; you can do it tomorrow. But our vision is we could have 100 plants. To achieve that, the system needs to be replicable, scalable, and malleable. PrintVis is all of those. They are a fantastic partner; I couldn’t ask for more.”

### Important Takeaways

- All four businesses chose PrintVis as their Print MIS.
- Customization and integration capabilities were critical for all four.
- The connection to Microsoft ERP systems was also a major consideration for all companies we spoke with.
- Despite the software being European, local resellers like [Kodak](#) and [Sabre Limited](#) provide local support including

training, implementation and customization.

## 5. Be Patient. Implementing an MIS is Not One-and-Done. It is an Evolving Process.

It’s no secret that implementing an MIS is not a trivial matter. For the greatest success, it needs to be a whole-of-company effort with representation from key departments and trusted employees who are empowered to make decisions. Once you go live, it doesn’t stop there. Conditions change, technologies change, and requirements change over time. It’s important to choose a system and partners that are with you over the long term to address these changes in a productive and meaningful way.

Hemlock’s Kouwenhoven says, “It is key to keep the perspective of looking at business benefits and how the systems work over-time. When you are adopting an MIS, you need to be committed to seeing the implementation through and be very committed to continuous improvement and to putting resources on it. An MIS implementation is not going to be done by Sabre or PrintVis alone; it’s a 50/50 thing. You have to put the time and effort in, to identify the goals and why you are doing it.”

He continued, “Because if you don’t do that, your partners will just try to solve what you are throwing at them. And that doesn’t necessarily result in your using the tool to its fullest. A lot of companies try to replicate what they were doing before, and you fight with the software when it’s not designed that way. You have to take a step back and say, okay, how do we accomplish this with this tool we now have. You have to go into it with an open mind. And that’s how you will get the most benefit out of your MIS implementation.”

Modern Litho’s Tomblinson adds, “Bringing prepress and MIS together is something I have dreamed about for years and could not get done.

Now we are getting it done. But what we are doing now is just scratching the surface. We are finding things all the time that solidify that it was the right decision, and we are able to do things we have never done before.

“For example, data reporting is huge; and we are able to do that in ways we never thought was possible before. It helps us run a better business based on facts and actual performance. When you have Microsoft Dynamics Business Central as the umbrella that holds all the data and Microsoft’s Business Intelligence for analytics, now we can pull that data any time we want, any way we want, and we can have reporting and analytics in this company we have only dreamed of. That’s exciting. The risk is too high to do business as we’ve always done it. We honestly believe we need the depth and security of Microsoft moving forward.”

Saint-Laurent comments, “Even though we have been up and running with PrintVis for some time, there is always more to do. For example, we built a proprietary web portal interconnected with our old MIS which we later integrated with PrintVis where current customers can order products, either from inventory or production. It gives our customers the flexibility they require.

“Now we are implementing a Shopify interface that will further enhance the experience and to which we will migrate our proprietary customer portal. And while we have turned off our previous MIS, we have maintained that data, which has now been made accessible through Business Central via further customization. That means employees are doing everything from a single interface. We are planning to move to the cloud in the years to come.”

### Important Takeaways

- Continuous process improvement should be part of any Print MIS project.

- Business needs change over time and ensuring the Print MIS will support changes is critical.
- Staff need to understand that Print MIS should be a journey, not a destination.
- As long as there is a cost/benefit that makes sense, continued investment in your Print MIS is good for business.

## Lessons Learned

Our conversations with these four customers were enlightening. They all have very different businesses and very different requirements. Yet they were able to meet those needs with PrintVis as their core MIS. We learned:

- Regardless of your business model, you are the expert in your business. The very first step in seeking a new MIS implementation is to do a thorough analysis of your existing business, determine gaps that are holding you back, and develop a vision for the future of your company. Once that is clear, you can more succinctly state your requirements and match vendor offerings to those requirements. In the process, you are likely to find new opportunities you never thought of before.
- Do a full due diligence. There are many Print MIS solutions available, and they are not all equal. It’s important to have a full discussion of requirements, including must-haves and nice-to-haves, with the target vendors, and to have a weighting system that helps you determine who can best meet those requirements. But don’t stop there. Go talk to their customers, especially those that are similar in size and capabilities to your firm. That’s where the rubber meets the road.
- Be sure to dedicate adequate resources to the project. The last thing you want to do is to have the vendor or its representatives do the work for you. You miss the training opportunity and the buy-in from your staff;

and let's face it, you are the expert on your own business. Let the vendor guide you through the implementation; but do as much of it as you can yourself, and position yourself to maintain and update the system moving forward. It's important to have a reliable and committed partner as well, in cases where you run up against something you can't do yourself. That, most assuredly, will happen as the system evolves over time.

- Assemble a group of partners that is committed to working with you for the long term. You want a collaborative environment and not one where there is a lot of pointing of fingers. You want partners who will be accountable for your success, and who can creatively guide you to continuous improvement over time.
- Finally, be patient. This is not a one-and-done effort, and that should be made clear to the entire team from the outset to avoid resistance and frustration. The whole objective of undertaking an initiative of this scale – a whole-of-company approach – is to make life easier for you, your team and your customers, and to make your company more efficient and profitable. Be realistic and be flexible.

Some companies want an MIS because their old one is unsupported by modern computers (and for no other reason). Some want an MIS for radical improvement and improved workflows. Some want an MIS so they can fit it to their specific needs as we saw with Canada Ticket. Some need better controls and processes as a step up on a path of continuous improvement.

The best overall advice? Know why you are getting an MIS and judge the results based on that goal.

This white paper was sponsored by Sabre Limited. To learn more about how PrintVis can change the way you do business, visit [www.sabrelimited.com/printivs](http://www.sabrelimited.com/printivs).