

Where your customers are ↘

How to reach them ↙

# WEB2

# PRINT

What to sell them ↗

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EDS*f*



## About This Book

This book is about elevating the print industry's conversation of Web2Print: the online connector between printers and their customers. Step one is to agree upon terms so we share a common language and understanding, step two is to focus less on technology and features and more on helping printers build achievable and profitable online businesses.

**Thanks to HP this book is being printed and distributed for free during Drupa 2012.**

All proceeds from this book go to EDSF, the Electronic Document Scholarship Foundation, an international charitable organization supporting the education and research efforts of the future leaders in digital content and delivery.

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Thanks to the printers who embrace change and  
are willing to evolve in order to fully participate  
in the digital economy

# TABLE OF CONTENTS

<b>Chapter 1: The Digital Economy</b>	<b>7</b>
Atoms vs. Bits Economies	8
Side by Side Comparison: Two Economies	11
Rate of Change	12
The New “Free”	15
<b>Chapter 2: Going Online</b>	<b>20</b>
Top 5 Reasons to Embrace Online Ordering	23
Self-Service	25
Order Entry System	27
Sales Cycle: Online vs. Offline	28
The Sales Cycle (minus the jargon)	29
<b>Chapter 3: Online Strategy</b>	<b>36</b>
What Are You Good At?	37
Assumptions: Value and Growth	38
SEVEN STEPS TO AN ONLINE STRATEGY	41
Step 1: Define Your Target Market	42
Step 2: Select Your Product Workflows	51
Step 3: Define Your Operating Geography	58
Step 4: Choose a Business Model — License or Subscribe	59
Step 5: Evaluate Your Team	63
Step 6: Choose a Technology Partner/Vendor	67
Step 7: Create a Change Management Plan	69
Evaluate Your Current Solution vs. New Strategy	71
<b>Chapter 4: Leadership</b>	<b>75</b>
Executive Participation	75
An Honest Evaluation of the Present Situation	76
Technical Activities vs. Business Results	77
More Coach, Less Boss	78
Leadership Out of Poor Decisions	80

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<b>Chapter 5: Implementation</b>	<b>85</b>
Define Wild Success	85
Who Implements on Your Team?	86
Keep the Customer's Perspective the Top Priority	87
Get Real Fast	88
Why Pilot?	89
Get It Moving	90
Implementation Mistakes and Fixes	93
<b>Chapter 6: Technology</b>	<b>99</b>
Buying Factors that Really Matter	100
Choosing a Partner	105
Features	107
ROI (Return on Investment)	110
<b>Chapter 7: Integration</b>	<b>111</b>
Master Data	113
Top Integration Questions	114
<b>Chapter 8: Workflow Automation</b>	<b>115</b>
Adding Web2Print to Your Workflow	115
Web2Print & Print MIS	118
<b>Chapter 9: Sales</b>	<b>121</b>
Solution Selling	121
Web2Print and Your Sales Team	123
Avoid Sales Chaos	124
Features Tell, Benefits Sell	129
<b>Chapter 10: Conclusions</b>	<b>131</b>
<b>Glossary</b>	<b>133</b>
<b>Index</b>	<b>135</b>
<b>About the Author</b>	<b>137</b>



## Chapter 1: The Digital Economy

Print is a major player in the information business. Everything that is printed communicates information for various purposes, including promotion, entertainment, and education. Today's digital technologies are changing virtually everything about the information business.

Web2Print is simply a connector between printers and their physical products and their customers who are **primarily** looking to engage and procure products and services online. Understanding the fundamental changes brought on by the digital economy helps us understand why it's so critical that printers embrace the web (the infrastructure of the digital economy) and leverage it in order to maintain relevance in the information business.

### AGREED MEANING

**WEB2PRINT:** The online connector between printers and their customers. A set of software tools which facilitate order entry via the web, Synonyms: web to print, web-to-print, print e-commerce

## Atoms vs. Bits Economies

The information business is simultaneously operating in two economies— the “atoms-based” and the “bits-based” economies. Business is rapidly transitioning from an atoms-based to a bits-based economy. Nicholas Negroponte first introduced this concept in *Being Digital* (1996, Vintage) He describes our current and past economy as based on “atoms” or physical stuff, the stuff that we dream up, manufacture, and distribute. He calls this a slow moving, “human handling” economy, and says the future is about the “bits” economy or the digital economy, which is the “instantaneous and inexpensive transfer of bits at the speed of light.”

### AGREED MEANING

**DIGITAL ECONOMY:** An economy based on processing bits (non-physical products and services) using digital technologies. Synonyms: Internet Economy, Web Economy.

Print is part of the atoms economy (physical stuff). In the atoms economy, we create content and distribute it as books, newspapers, magazines, mail, flyers, and signage. The information business has a new distribution system.



## Virtually every product sold in the information business can be rendered in a digital form.

The industry has been encouraging printers to become marketing service providers in order to diversify from a 100% print manufacturing revenue stream. Negroponte would agree that printers need to figure out a way to render a portion of their information products in digital form in order to participate in the bits economy. Atoms-based economies aren't going away — food, shelter, and clothing cannot be rendered and consumed in a purely digital form — but we work in the market that is most impacted by this monumental change because the entire information business is perfectly suited for digital distribution. Don't mistake the digital / bits economy with digital printing; all print is still very much atoms-based (physical stuff).

Remember all the hype in the 1990s about the potential of the Internet? Most of it had to do with the fact that we didn't understand the implications of a distribution system that is deflationary; that is, where the costs are rapidly decreasing. Yes, I'll say that again. The costs of distribution in the digital economy are plummeting. Or as Chris Anderson writes in *Free: The Future of a Radical Price* (2009, Hyperion), we are “racing towards the inevitable radical price of free.”

For example, it will cost Google 50% less to stream your YouTube video next year (bandwidth costs), and it will cost Google 50% less to host your Gmail account next year (storage costs).

In the 1990s we thought we could reap the benefits of the bits economy simply by online-enabling procurement in the atoms economy. For example, there's no way to render dog food into a digital product; hence, the only real efficiencies were in the ability for customers to order online. Pets.com imploded because the world didn't need another atoms-based distribution system for dog food. On the other hand, Amazon thrives, because creating an unlimited inventory in the information market is a huge benefit, even if you're shipping atoms.

Now with the Kindle, Amazon has rendered its core product into a pure digital form to participate directly in the digital economy. In July 2010, Amazon reported that Kindle sales (digital economy) now outpace books (atoms economy) for the company.

## Side by Side Comparison: Two Economies

	Atoms Economy	Bits or Digital Economy
<b>Distribution</b>	Slow Expensive Labor Intensive	Instant Free Brain Intensive
<b>Based on</b>	Scarcity	Abundance
<b>Pricing</b>	Inflationary	Deflationary
<b>Inventory</b>	Limited	Unlimited
<b>Created</b>	Mass Media Advertising	Relevancy/Targeted Advertising
<b>Progress</b>	Incremental	Exponential
<b>Currency or Currencies</b>	Money	Money Reputation Attention
<b>Consumption</b>	Once	Unlimited (With Increasing Returns)
<b>Free</b>	Ad Supported Gimmick/Sample	Ad supported Valid Business Model

A distribution system that has unlimited inventory and whose cost of distribution is deflationary creates an economy based on abundance rather than scarcity. In the atoms-based information market, prices are based on scarcity; there are only so many TV spots you can sell during the Super Bowl; there is space for only so many ads in a printed magazine. An abundant economy includes an unlimited number of books (Amazon), an unlimited number of songs (iTunes), and

unlimited content (blogs, wikis, websites) because the cost of incremental additions is essentially too low to measure.

What do unlimited inventories do to product selection and the whole idea of blockbusters? Chris Anderson explains brilliantly in *The Long Tail* (2006, Hyperion). This unlimited inventory (“the long tail”) represents “the end of the *monopoly* of the blockbuster, as hits are forced to share the stage with countless niche products targeting narrow consumer demand.” Michael Jackson’s Thriller album was a blockbuster partly because we had a limited inventory to choose from — the top 5,000 albums. Today we have access to our true niche tastes (e.g., Indian Jazz Fusion) because the digital economy allows a platform like iTunes to service the niche market as effectively as it serviced the mass market.

## Rate of Change

If you’re feeling overwhelmed, put your seat belt on because the rate of change in the digital economy is exponential. Moore’s Law is the most famous example of exponential progress in the digital world. It states that “the number of transistors that can be placed on an integrated circuit doubles approximately every two years.” And Anderson points out that “the price of bandwidth and storage is dropping even faster.”

The digital world combines incremental improvements with breakthrough inventions giving it a steep evolutionary curve.

The atoms economy is moving incrementally; the bits economy is moving exponentially. One side effect of these differences in pace is that the participants in each economy have different comfort levels with change. People in the bits economy view change as ubiquitous and fast; people in the atoms economy see change as incremental and slow. One side embraces change; the other is cautious and frequently resistant.

The software market is a good example. Today software is typically sold in two primary ways: License or Software as a Service (SaaS) Subscription.

#### AGREED MEANING

**LICENSED SOFTWARE:** a legal instrument that grants the purchaser the right to use the software, the business model is typically an upfront license fee with an annual maintenance.

#### AGREED MEANING

**SaaS (Software as a Service): a legal instrument that grants usage of software over a specified time (i.e. monthly). The business model is typically a monthly subscription.**

There is still an active debate in the print industry about licensing versus subscription for Web2Print solutions. While we in the atoms economy are debating this issue, the bits economy has evolved to yet another revolutionary invention that radically increases efficiencies and decreases costs of software deployment — cloud computing. Cloud computing is the ultimate global pooling of resources — **rent only what you need in per minute increments** (bandwidth, storage, processing power).

The US government estimates the average server utilization in its 1,100 data centers is 7%, an unbelievable amount of waste in several critical resource pools, power being the most obvious one. Pooling those resources in a cloud computing model would enable the government to pay for only the resources it consumes, representing an incredible savings in hardware, software, and energy.

While printers still grapple with decisions about License versus SaaS, the digital economy is racing towards further optimization. Maybe one of the most important lessons

we can learn from the bits economy is that we must embrace change or be left in the dust!

## The New “Free”

An abundance economy built on bits and a free distribution system creates a very different kind of free. Anderson’s *Free* builds on Negroponte’s atoms-versus-bits distinction and his own ideas around “the long tail” and brilliantly describes the impact of the digital economy on the business model of Free. He writes, “While the last century’s ‘Free’ was a powerful marketing method, this century’s ‘Free’ is an entirely new economic model.”

Yes, we still have the ad-supported free. Google is the poster child for ad-supported “free to me” on the web. We think of Google as a software company, but Google has a very traditional media business model. *The New York Times* sells readers to advertisers (mass media); Google sells individual user intent to advertisers (relevance media). The advertisers on Google pay so that we can search for free. Traditional media companies keep saying online advertising is destroying their business. Online advertising is rapidly demonetizing the atoms-based information market because mass media is inefficient, bothering 90% of us to find the few who are interested in the product. Think denture commercials watched by your kids. Google’s search delivers relevance at the

individual level which is a better mouse trap, and it opens advertising up to a much bigger market.

The mass media approach had so much waste that only the deepest pockets could afford it. Today if you are a bonsai tree specialist in San Francisco, you can afford to advertise online because Google only charges you when someone clicks (very little waste).

Probably the most radical implication of this new economy is a viable business model that is based on giving your product/service away for free. Not the gimmicky free of yesterday, but a genuine free to most of the users of the solution forever. Thus the name “freemium” gets introduced into the Web 2.0 lexicon.

#### AGREED MEANING

**Freemium: a business model by which a product or service (typically a digital offering such as software, media, games or web services) is provided free of charge, but a premium is charged for advanced features, functionality, or related products and services.**

WhatTheyThink.com runs on a combination of freemium and premium or ad-supported. The majority of viewers are free forever — supported by both ads and premium member



subscription. Online video games are another model where the majority of players play forever without spending any money, subsidized by those players who choose “premium” paid-for options.

The Web 2.0 software version of freemium is the most interesting. There are a tremendous number of free services available today via these models that provide real value for the long term for the majority of users. It runs the full gamut from project management software such as 37 Signals’ Basecamp to MailChimp’s e-mail campaign software.

*A successful freemium business model typically shoots for at least a 5% conversion of users to its “premium” offer.*

The key to this business model is multifaceted. Servicing the 95% has to be very close to free (think brilliantly easy-to-use software because support costs will kill you), and then think scale. This model only works if you can scale it, and therefore, the 5% conversion is a meaningful number. Some of these companies combine freemium with ad supported revenue streams, but there are 100% freemium business models working today where they are building successful business by giving away their services to 95% of their customers!

When change occurs, opportunity knocks, and there is also fallout. “Rapid market demonetization” (Anderson’s term) is

part of the fallout. The examples are startling. Consider the encyclopedia market. Britannica was the leader of this \$1.2 billion industry in 1991. In 1993, Microsoft launched Encarta. And as venture capitalist Josh Kopelman described it, “Every dollar of Microsoft’s gain caused an asymmetrical amount of pain in the marketplace. They made money by shrinking the market.” The encyclopedia market was cut in half in less than three years. That’s how de-monetization works.

Print (along with other atoms-based economies in the information business) is experiencing a form of demonetization; as new digital distribution companies are created, the market for atoms-based information shrinks.

Print manufacturing will always be a physical product (atoms economy), but that doesn’t mean that printers can’t leverage the advantages of the digital economy in their businesses. Staying competitive in the atoms economy requires learning the efficiencies of the bits economy. The best published example I’ve heard of comes from the oldest continuously publishing newspaper in the world, *The Daily Telegraph*. Its’ Chief Technology Officer Toby Wright moved to a 100% SaaS software model with his IT infrastructure in the Cloud, drastically reducing costs and enabling *The Daily Telegraph* to focus on the core activity of creating valuable content for its readers.

In order to remain competitive, atoms-based businesses must leverage all the advantages of the bits-based economy.

Change impacts each of us individually. The authors quoted here help us to understand the roots of this transition from an atoms-based economy to a bits-based economy and how this impacts the print industry. Understanding that this is a global transition can help us navigate better and chart a course that inspires rather than paralyzes.



## Chapter 2: Going Online

Your customers are online today. They are transacting in a self-service manner online in their personal lives and in their business lives. They moved online as soon as they were given the opportunity because for routine transactions, self-service is

more convenient than full-service — even excellent full-service with hand-holding.

Since you value your time and your customers' time, it's time to let go of control. It's time to let go of limiting beliefs about how print is unique or how much knowledge is required to precisely specify a print job. And it's time to do this before one of two things happens:

**A competitor steps in** and shows your customers how her company can save them time or

**A digital native steps in** and shows your customers how much easier it is to buy, monitor, and track marketing dollars utilizing digital channels vs. print.

But you say, *“My customers are happy with the high touch service we give them.”*

And you add, *“Transitioning our offline customers to online commoditizes the product and encourages them to shop on price alone.”*

What we can learn from the experiences of Encyclopedia Britannica and Blockbuster Video is that existing revenue streams can be the enemy of innovation. Encyclopedia Britannica held onto the belief that people loved the expensive leather-bound books, and they lost out on the chance to capture any of the CD market. Blockbuster was well-aware of the Netflix model, but they held onto the idea that customers liked to shop in their stores.

We naturally want to defend revenue streams even in the face of overwhelming evidence that says we should actually cannibalize our own business to grow the next business. Yes, remember when you converted customers to digital printing on demand, and they printed a lot less but wasted a lot less as well? Nobody would say you made the mistake of converting the customer even though you probably made less money on them in the short term. You cannibalized one part of your business to grow another with the same customer!

Transitions are hard. Business is moving online. If you don't transition your customers, your competition will. Imagine how easy that sale will be. A competitor can come in and give this pitch:

*We will enable you to see into our production workflow so you can inquire about the status of your job 24/7. Additionally, we'll proactively send you updates when the job is ready for pick up or has been shipped. You can order from us any time. If you can't provide all the details via self-service ordering, it's OK we'll contact you and complete it for you — that way the full order will be logged and track able by everyone. You will never have to call us to ask for a duplicate bill or invoice because you'll have access to all your transaction history online.*

Notice that not much of this pitch was about print — it's about CONVENIENCE and TRANSPARENCY.

If you're still not convinced and your defense is, "My customers aren't asking to order online," remember customers are just as comfortable with the status quo as you are. The role of sales is to persuade people to change. Wouldn't it be better to take your customers through the transition even if it means you might have to get a bit more competitive on price? What's a better alternative: losing all the business or remaining competitive and keeping the majority of it?

**Moving your business online isn't about following a trend; it's about following your customers!**

*InfoTrends estimates that by 2014, over a quarter of commercial print revenues will be submitted through Web2Print systems.*

## **Top 5 Reasons to Embrace Online Ordering**

- 1. Commerce is Moving Online**
- 2. Online Ordering Captures the Entire Customer Interaction Electronically**
- 3. Online Ordering Allows You to Offer Additional Products and Services**
- 4. Self-Service Order Entry Saves You Time and Money**
- 5. Technology Deepens Your Relationship with Your Customers**

### *1. Commerce is Moving Online*

Online commerce continues to grow. Even when consumers and businesses buy offline, they are researching online first. New business growth is dominated by pure online offerings. Some of the fastest growing print organizations ever have been created as pure online plays in the last decade. Not all your business fits online. Consider the analogy of the bank ATM. We process our simple transactions in a self-service manner, whereas we go into the bank for full-service transactions like loans and mortgages. Print is no different — simple, repeating transactions are better served via a self-service model, and

complex print projects will always benefit from full-service expertise delivered personally from your staff.

## *2. Online Ordering Captures Entire Customer Interaction Electronically*

When you interact with your customers online, your ability to evaluate and manage your business is greatly improved because you have access to new data. When do your customers order? How often? What's the overall product mix of your company? Data is one of the key advantages of electronic commerce. Pure e-commerce players are utilizing data to outcompete offline competitors. Going online enables you to learn more about what, when, and how your customers are interacting with you.

## *3. Online Ordering Allows You to Offer Additional Products and Services*

Software can automate tasks in a manner that makes products and services profitable. The best example in the print world is custom photo products. Color calendars have been around for decades, but before online technology, they were cut and paste projects on the glass of a color copier. Today, customers can custom design their photo books with access to their photo libraries across the web (i.e. Facebook, Flickr), and then deliver to you a fully-composed, press-ready PDF. Online technologies enable you to broaden your products and services.



#### *4. Self-Service Order Entry Saves You Time and Money*

Online ordering gives your customers MORE CONTROL because your customers can now order from you when it's convenient for them. When your customers order online, your workflow starts at their desktop without YOUR LABOR. Customers want the control; you need the labor savings. Manual order entry (i.e., phone, fax, e-mail, FTP) all take time and effort by both YOU and YOUR CUSTOMER. Save everyone time and money by enabling self-service for those products and services that are suited for a self-service interaction.

#### *5. Technology Deepens Your Relationship with Your Customer*

If you are currently relying on all manual processes for communicating with your customers, you're missing out on the opportunity to embed yourself into the customer's workflow. When vendors are embedded, they are more difficult to replace. Don't risk being easily replaced by not offering an online ordering solution. Any customer you're interacting with manually today could have a competitor offering an online solution as a tactic to replace you!

### **Self-Service**

The word "service" usually means personal service — one human providing something to another — an exchange of value. As technology evolves and access to technology continues to expand, "service" can be executed with fewer

human touches. Companies can deploy technology to do what humans used to do — often in a more efficient manner.

Print has been a high human touch service for a long time. Custom manufacturing usually equates to a consultative order-taking process. The advances on the web are changing the dynamics of custom manufacturing AND the consultative order taking process. BUT not for everything you sell.

Self-service isn't about doing everything; it's about strategically choosing what products and services are suitable and then allowing technology to provide the "service" rather than labor. What portion of your product portfolio is well-suited to a self-service interaction? When you answer this question, you understand why the business card has been the product printers sell online first. There's little value to collecting the custom manufacturing requirements for printing a business card. In fact, collecting the data in a full-service fashion is totally error prone.

Advances in web technology are making more and more print transactions "suitable" to a self-service interaction. We have full document assembly happening in a web browser. This provides a better experience than I used to deliver over the counter at Kinko's, the retail copy shop in the US that was eventually purchased by FedEx.

If your first reaction to moving your business on the web is "giving up control" or "removing your value-add," think about

it from the customers' perspective. You are GIVING THEM control and enabling the value-add to be delivered in a more efficient manner.

## **Order Entry System**

Too many Web2Print solutions are exceptions for “special” jobs like variable data or re-orders from a catalog. If you see Web2Print as only a path for exception jobs, this means the majority of your order entry is still based on manual processes and most of your customer interactions are high touch (i.e., multiple phone, fax, e-mail, per order).

The Internet is your gateway to AUTOMATE order entry and provide TIME savings to your customer and your company.

Many companies invest a great deal of money and time on Web2Print solutions. Yet they had no intention of migrating away from e-mail, FTP, phone, fax, and setting up special arrangements for individual customers to send them work. In this scenario, the Web2Print solution just turned into yet another ball your operations team has to juggle on a daily basis.

The argument goes like this, “You don’t understand; my customers prefer e-mail, fax, and carrier pigeon. The customer is always right. We’ll take the job however they send it!” Be very careful — these are dangerous assumptions.

The customers you deal with on a daily basis aren't necessarily the decision makers when it comes to picking print vendors. They are the soldiers placing the orders and given the choice, they want zero change to the status quo. When the decision maker gets pitched by a new printer who shows automation in the order entry that cuts labor costs, you're doomed. You thought that because your customers didn't ask for web-based ordering with automated status updates, you didn't have to provide it!

*Henry Ford said, "If I would have listened to the customers, I would have delivered a faster horse."*

*A hundred years later, Steve Jobs said essentially the same thing: "There's an old Wayne Gretzky quote that I love. 'I skate to where the puck is going to be, not where it has been.'*

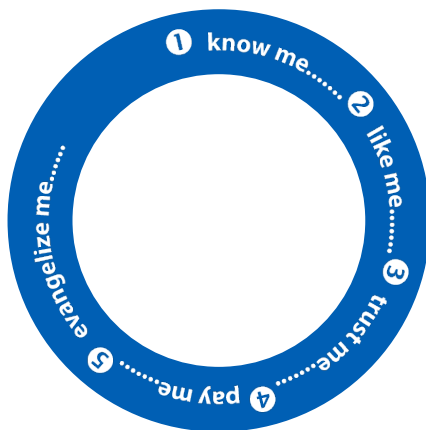
## **Sales Cycle: Online vs. Offline**

Going online isn't just about technology. In fact, technology is simply the enabler for going about your business via different channels.

Moving online changes a lot about how you interact with your customer. It also impacts the sales cycle. Let's examine how the sales cycle differs from online to offline.

When you distill the sales cycle down to its simplest and non-jargon laden terms you get this process: know me, like me, trust me, pay me.

Every prospect who becomes a customer goes through the first four stages. Some take years, others can move through all four in the course of one shared drink or a single visit to your website. If you've got a compelling product, a sizable portion of your customers go to Stage 5 — from paying you to evangelizing you, which continues to pay you in the form of bringing new customers via referrals.



## The Sales Cycle (minus the jargon)

### *Know Me (Offline)*

Know me offline is dominated (at least locally) by the yellow pages or a business directory of some sort. This is where we went to find businesses. The businesses were organized according to the **language of business**; the yellow pages and the businesses (advertisers) categorized the businesses and then organized the categories alphabetically. Many companies

were named to give advantage to their listing in the yellow pages, for example, AAA Plumbing.

### *Know Me (Online)*

Know me online is dominated by search, and approximately 70% of searches are controlled by Google.

**Search is in the language of the customer,  
this is CRITICAL to understand as part of  
doing business online.**

Businesses don't get to dictate if and where they are found based on their language. The customer's language is now in the driver's seat. Google is not alphabetical; naming your company AAA Plumbing won't help online. Search is algorithmic, and Google changes the formula all the time.

What does this mean to a company transitioning from offline to online? Know Me is a whole different world. Your success in getting found depends on your ability to first and foremost master your customer's language. Yes, even before you start talking about search engines, website optimization, and online advertising. The most important aspect of getting found online depends on your ability to master the language of your customers. Everything you do online feeds into this strategy because you optimize your website, your advertising spending, and your publishing — blog, social media, etc. — to target your customer's language.

### *Like Me (Offline)*

If you think of our offline world, how do customers get to like you? Word of mouth is probably one of the most popular ways — a recommendation from a trusted source holds a lot of power because the recommendation typically comes from someone who has already done business with you. Like Me in the offline world can also come from extending your brand beyond commerce. For example, a San Francisco mattress company sponsors a coat drive each year for kids in foster homes. The community involvement boosts their brand outside of the need to simply purchase mattresses.

### *Like Me (Online)*

The process of getting prospects to Like Me online can be very similar to offline (e.g. word of mouth); the major difference is that in the online world technology enables both positive and negative references to your business to spread further and faster. Today the spread of social media tools enables you to check in with your network about any purchase you are considering.

For local businesses this recommendation process has been formalized through tools like Yelp. Depending on the use in your geographical area (in San Francisco there are Yelp entries for virtually everything), Yelp can be a major source of new business. If you have good reviews on Yelp, the business leads

you receive could virtually be ready to pay you — no further sales efforts required.

One of the key differences between the offline sales cycle and the online sales cycle is the fact that the online sales cycle can literally be self-service on the prospect's part.

Imagine your current business with a meaningful percentage of your customers escorting themselves through the sales process. You have to put forth the effort to create an online environment that enables you to get found, and create meaningful and compelling content about the challenges you solve for customers (notice how I did NOT say “about your products and services”). If the customer is going to escort themselves through the process (self-service) it HAS TO BE IN THEIR LANGUAGE.

### *Trust Me (Offline)*

In the offline world how do you earn prospects' trust enough for them to move through the sales cycle? Typically, this comes from referrals or a positive association with your company or the people in your company. Trust can also be earned by informing your customers of other companies like theirs that you have solved similar challenges with. Trust isn't easily earned, but it's necessary for customers to actually transact with you.



### *Trust Me (Online)*

Gaining trust online is different, and yes, it can be done in a self-service fashion. Earning prospects trust online involves you giving away a lot more than we're used to. It's not about free samples; it's about exposing who you are, what you know, how you think about customer challenges, and what you do to solve them.

This might not be an easy message to get, but the reality is that customers now expect value BEFORE they pay you. The way to do this is to provide value, communicate how you work, describe the solutions you are providing for customers — teach! When you do this effectively, what you get are prequalified customers who are ready to pay and know exactly what you can do for them — what a relief that would be? Its real, it's happening, and it's a golden opportunity for you to convert a portion of your new business development efforts into a self-service sales cycle.

### *Pay Me (Offline = Full-Service)*

In the offline world customers pay you with cash, check, or credit card in person or via monthly invoices. Pay Me involved your customer's labor AND YOUR labor. In addition, in most business to business relationships, full-service payment meant "pay later," and for some customers, this meant pay A LOT later or maybe NEVER.

Full-service payment = investment of your labor and typically, a built in delay in your cash flow.

### *Pay Me (Online = Self-Service)*

Online Pay Me is executed by the customer in a self-service fashion, and in many cases, the payment is at least qualified at the time of purchase. Frequently this can mean a complete change of payment timing — pay BEFORE you provide the services. What does it require of you in order to actually have customers pay you online?

- You have to have a platform for selling your products and services online (e-commerce).
- You have to price your products and services online.
- You have to accept payment online.

If you operate a retail location, you have a cash register. When you move your business online, the shopping cart is the cash register. The technology has to include a shopping cart for you to truly do business online.

Exposing prices online is the major roadblock for most printers. Our industry has enjoyed secret, custom pricing for a long time. A common resistance to going online is, “I’m not engaging in e-commerce because it will expose pricing to my existing customers, some of which are paying the highest prices.” Playing defense is one strategic option. Encyclopedia

Britannica played defense against their margins on leather-bound sets of encyclopedias. When CD's came to market, defense turned out to be a pretty horrible strategy.

Cannibalism is a strange word, but in the end its better to eat one side of your business to grow another vs. losing the entire business altogether.

Let's consider another industry that had secret custom pricing — the airlines. Think about a major air carrier trying to hold onto that custom pricing rather than having it available online and on sites that can directly compare virtually all ticket prices side by side. An airline taking that strategy would no longer be competitive in today's air travel market.

*Going online means more transparency. Yes, that even means transparent pricing because the “transactional drag” of custom quoting will force your customers to look elsewhere.*

Time is the ultimate limited resource, for you and your customers. Spend too much of your customer's time, and they will find a competitor who has the customer's time as the highest priority.



## Chapter 3: Online Strategy

If there's one thing we should change across the board about our industry-wide approach to Web2Print, it's to redirect our focus away from technology and feature lists and toward building successful online businesses.

The number one mistake printers make is to start the process of moving online by shopping for enabling technology. They enter a sea of vendors with hundreds of products, thousands of features, and dozens of different business models — only to come out the other end dazed and confused, wondering how and why they chose the solution they did or didn't.

Strategy is an overused word; it makes many people cringe as if we're diving into an esoteric or academic study of something rather than getting stuff done.

My version of online strategy can be written on a cocktail napkin. It requires more thinking than writing, and if you complete the process and believe in it, the ROI will be immediate. Once you define it, you'll think, it's so obvious, we knew this all along. If you don't define it, you'll drift, which will result in wasted time, money, and lost market opportunity.

The process is short, but that doesn't mean you can wing it. The answers are critical. The only non-valid answer is, "We want to do everything." This is the sure fire way to fail on the web (actually, it's the sure fire way to fail at almost anything.) Success is no longer measured in how much you can do; the focus has changed to what you can do really well. The common tech examples are, Yahoo! who spread their business thinly across everything, the now famous "Peanut Butter Manifesto" — dabble in everything — versus the very strong position that Steve Jobs took when he returned to Apple: do a few things very well, and be just as proud about the things you choose not to do.

Before we jump into the components of your online strategy, let's consider the following question in order to anchor your entry into the online world in reality.

## **What Are You Good At?**

There is a lot of talk about printers needing to evolve, to transition, to change, and to react to the new landscape of digital media.

The first thing to consider first is what are you good at? (If you prefer smart sounding business lingo, then "what's your core competency?")

The answer will give you a good starting point for determining where/how/what you're going to evolve into. You can't simply

run off and jump into the marketing services arena if the only expertise you have on staff is print manufacturing (i.e. excellent press folks, pre-press experts, etc.).

*Please don't kid yourself; while there may be some exceptions, the ability to evolve from manufacturing experts to marketing experts is not common.*

Look at your talent. Look deeper than your initial impressions. Ask more questions and don't assume you know what individuals are good at because they've worked for you for years. Do you know how they engage in digital/social media outside of work? Do you know if they have a personal passion for environmental issues? Could the leader of your green initiative or your social marketing strategy already be sitting in your pre-press department?

And what are you good at as a business and as an individual business leader? Maybe a merger makes sense because you know you absolutely love the manufacturing part of your business and absolutely hate the sales and marketing part? Find a partner that loves what you can't stand.

## **Assumptions: Value and Growth**

We are all embarking on uncharted waters. How much of our planning is "educated guessing?" How many of us have wasted countless hours creating complicated sales projections

for new products or estimated adoption rates of a new product when we knew, admit it, it was a big guess? Face it; sometimes we don't have a clue what's going to happen, and for sure, neither do your bosses!

We do, of course, have to define some assumptions so that we at least acknowledge what we're thinking and what we expect/need/want the data to prove. In *The Lean Startup* (2011, Crown Business), Eric Ries discusses value and growth assumptions using the early days of Facebook as his example.

*The interesting thing about Facebook is that the young organization had data — real data, with real customers, which supported and validated both their value and growth assumptions. Their users returned to the site daily, often multiple times a day, which supported their value proposition. Student adoption of Facebook on college campuses was frequently as large as 80% of the student body within the month it was launched.*

These were not guesses. These were validated with real customers in the real market on a real solution. What are your value assumptions and your growth assumptions for moving your business online?

Eric Ries suggests you don't waste your time guessing at all. Figure out how to get something real and get the learning started ASAP.

Here are some examples from our industry on how this approach can help us maximize the real learning.

### **1. On boarding a new customer**

Pick a single product and set up the full workflow (from order entry to invoice) and get that product in a live ordering state immediately. From there you can continuously improve the workflow and add other products.

### **2. Launching a New Product**

Outline the “minimum viable product” and launch that to a limited set of customers, even if you think it’s not perfect or ready for prime time.

Admit you don’t know what you don’t know and having more meetings about it will not get you any closer.

Start the learning process and be flexible and most importantly, be open to be proven wrong!
















## SEVEN STEPS TO AN ONLINE STRATEGY

### 1 WHO are you selling to online? TARGET MARKETS

B2B	B2C	Both
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### 2 WHAT are you going to sell them? PRODUCT WORKFLOWS

 ad hoc digital	 ad hoc commercial	 ad hoc oversize	 static products
 business documents	 photo products	 print on demand	 promo products
 inventory products	 VDP: B2C Template	 VDP: B2B Template	 request a quote
 non-print products			

### 3 WHERE do you want to operate? GEOGRAPHIES

Primary	Secondary	Tertiary
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### 4 HOW do you want to partner?

SaaS	License
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### 5 EVALUATE your team.

Leaders	Partners
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### 6 CHOOSE a technology partner.

Vendor	Partner
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### 7 CREATE a change management plan.

 change management plan
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Transitioning your business from an offline business to an online business is a major change. It is critical to take into account where the resistance might appear and how you're going to deal with it. Engage your staff in the strategy, collaboration builds momentum; sales resources are critical change agents in organizations — leverage their positive attitude towards change.

## **Step 1: Define Your Target Market**

The first step is to answer the simple but powerful question, who do you want to target online? Create a working definition of your ideal customer. You may have several flavors of ideal customers, for instance; a large corporate customer who prints with you regularly and partners with you to come up with solutions for their business. Another ideal client might be small to medium size businesses in your local area who print infrequently but collectively they add up to a good percentage of your business.

### ***Define Your Offline Target Market***

Understanding your customer is critical to your online business success. Knowledge of your target customer permeates everything you do online, from determining your search engine optimization strategy, to understanding what compelling content would appeal to this audience.

Most printers describe themselves in terms of manufacturing processes (e.g., digital, offset, web, etc.). Determining your online market will have a lot to do with who your offline (current) target market is, what you print for them, and why.

What if your answer is, “We print anything that comes in the door?” That might be your approach offline, but if you’ve been in the business a while, there are some patterns to your customers and the products you provide that will help in determining your online print strategy. The “we’ll do anything customers ask strategy” is not an option online because you have to offer a site that can facilitate the transaction in a self-service fashion.

*Online, you have to learn more about your customers, and your customers get to know more about you.*

The transition from offline to online isn’t just about how and where order entry takes place. It’s about self-service vs. full-service, and a print manufacturer converting to a communication solutions provider. If you’re going to be in the solution business, you have to learn what and why the customer is printing in addition to the HOW. The easiest place to start this education is to look at the customers you service today. Pay attention to what they are printing, why they are

printing it, who the intended audience is, and what they know about that audience.

Because print now competes with communication products that are purely digital and can be tracked in electronically, it's critical for you to both understand and assist your customers in achieving the greatest ROI possible for their print communication. This starts with asking a few more questions that extend outside of the manufacturing area:

- Who is this piece going to?
- What do you know about them?
- What is the communication intent? Is it compliance, promotional, educational?

Create a simple checklist and delegate a staff member to chase down the information for you. The checklist would include items like the following:

## Step 1: Define Your Current Customers

**Customer**

**Decision Maker**

*i.e. What role in the company made this purchasing decision?*

**Industry**

*i.e. Construction, financial services, etc.*

**Print Piece Name**

**Product Type**

**Communication Intent**

*i.e. Promotional, compliance, educational, etc.  
best to use pre-defined categories*

**Audience**

**Level of knowledge about the audience**

*i.e. Mailing only through purchasing data, etc.*

**One time communication or a campaign?**

***This might be the best question in your sales arsenal.***  
*It's a leading question that will open the opportunity to participate in either building a campaign or bidding on other parts of an existing campaign.*

When you've collected this information, analyze it to detect patterns. Do you have a large propensity of your current customers in a single industry, product, or communication intent? Look at what you're already good at because that will help determine your strategic path to transition and then grow your business online.

### *Determine Your Online Target Market*

So you looked a bit deeper into your existing offline business (Step 1), now it's time to utilize that knowledge to determine your online target market. A lot of people look at going online as a chance to start a totally new business, not necessarily tied to the business they are in today. I'm not against that strategy. Here's my concern: when offline printers who are 100% business to business (doing business with customers they know) decide to jump online with a 100% business to consumer strategy (targeting strangers), they are trying to make a lot of changes at once.

#### AGREED MEANING

**BUSINESS 2 BUSINESS (B2B):** A target market that inherently means you're doing business with people you know. You have established a relationship with these customers and now you are servicing that relationship.

#### AGREED MEANING

**BUSINESS 2 CONSUMER (B2C):** A target market that focuses on transactions with individuals or direct to the consumer for their own use, a print example would be a color calendar purchased from a photo site. B2C addresses a market of people you **don't know**, because of this B2C solutions need to support anonymous shopping, credit cards, tax calculations, self registration, etc.

Not only are you operating a business in a different economy (digital economy), you are also targeting a totally different customer. This is a lot to learn at once. I understand the rationale; you see your offline B2B print business declining, so you think why don't I diversify? Moving online is a different way of doing business; you need to learn how to do this for all parts of your business. Business is moving online. My recommendation is that you focus on transitioning your existing business online first (i.e., learn with a business you know) and then consider targeting different markets, selling different products, and extending your geographical area after you've executed online with your existing customers.

Too often printers equate going online with "chasing VistaPrint." You will only be chasing VistaPrint if through the

analysis of your existing business you determine your target market is micro businesses (1-5 customers) whose average transaction falls in the range of \$30. If you're an independent regional printer, it's highly unlikely that this is your target market or your target average transaction.

**Don't confuse going online with business strategy. Going online is a move to meet your customers where they are and provide the self-service procurement process they demand. What you sell and who you sell it to is your business strategy.**

This is why I suggest investigating your current target market (in your offline business) BEFORE you start planning for your online business. The best target market is the one you're already serving; the best products to launch online are the ones that you produce today. Think about moving online as setting up a self-service order entry for your existing customers (e.g. an ATM machine or a drive thru).

As far as target markets go, the first decision to make is do you target customers you know (B2B) or strangers/anonymous shoppers (B2C)? Customers you already know require an online experience that incorporates what you know about them into the user experience. For example, you know how your customer pays (online payment methods), what their pricing is (online pricing calculation), what products they



buy (product workflows), and who can buy (online authentication/login). All the things you know about the customer from your offline interactions can be embedded into the storefront, automating the transaction and saving time/labor for both you and the customer.

Your existing book of business defines your online target market; it could simply mean you setup unique storefronts for each of your customers. Once you gain the critical operational experience of doing business online, you can start to look at other online target markets.

Because printing is custom manufacturing, you can literally create an infinite number of products using the same manufacturing processes. The printing press doesn't care whether it's a business card or an annual report. So in the offline world, printers developed a mentality — we'll print just about anything. The dynamics of online business has fundamentally changed this go-to-market strategy. Online business strategies are about niches, rather than generalists. Why? Because reaching customers online is fundamentally different (search driven), and a self-service commerce model forces you to provide a user experience where the customer can define what they want without your help.

Want more proof? Look at the successful online printers. What do they have in common? They are niche players. By niche I mean specialists rather than generalists. VistaPrint has

a very focused target market and product set. Mimeo built a \$100 million business printing on one size of paper. Where the offline print business strategy might have been defined as, “expand your capabilities to cover the gamut for the customer,” the online print go to market strategy is about specialization in a product, market, industry, and/or segment.

## Step 2: Select Your Product Workflows

Once you determine “who” you intend to sell to online, the next step is to clearly identify “what” you intend to sell to them.

It sounds obvious, but it might be the most underappreciated step in moving online. What you sell today (offline) is determined by your sales team and the folks who answer your phone. A human determines, in real-time if the product a customer describes can be provided by your company.

Online business is self-service so software has to replace the human brain and it isn’t nearly as flexible. This is why you have to get clear about what you want to sell before you go down the path of looking at technology.

When you think about “products” please do not think about manufacturing processes. You don’t create digital printing for customers — you produce promotional brochures or compliance reports. Product workflows online are the guided steps required to take a customer through the ordering process, which is unique to that product. For example, for a poster you ask about final size/scale, price by area, and foam core mounting. For a letter size report, you ask very different questions about binding and tabs.

The following table outlines the most common product workflows pertaining to Web2Print today. Think of Product Workflows as the steps customers take after they have found

the product they want (shopping) up until they click add to cart (procurement).

### *Print Product Workflows*

The following fourteen product workflows are common to Web2Print. A key part of your online strategy is choosing which products you want to enable your customers to order in a self-service manner online. This will really help you determine the right technology, as all Web2Print technologies do not support all these workflows.



ad hoc print

**Ad Hoc Print:** An online print product workflow where the customer provides the content (ad hoc) during the ordering process to request a print job.

**Product Examples:** brochure, flyer, newsletter

**Expected Features:** file upload and collection of the associated print and finishing specifications (configurable job ticketing).

**Typical Manufacturing:** cut sheet digital or commercial offset depending on quantity



ad hoc  
business documents

**Ad Hoc Business Documents:** An online print product workflow where the customer provides the content (ad hoc) during the ordering process for a business document.

**Product Examples:** training manuals, presentations, and reports

**Expected Features:** multiple file upload, combine files, PDF conversion, add tabs, print and finishing specifications (job ticketing), and a preview of the finished product.

**Typical Manufacturing:** cut sheet digital

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ad hoc oversized

**Ad Hoc Oversize:** An online print product workflow where the customer provides the content (ad hoc) during the ordering process for an oversized print job.

**Product Examples:** posters, signs, and banners.

**Expected Features:** file upload and collection of the associated print and finishing specifications unique to oversized printing like resolution, final size, scale, and mounting (configurable job ticketing)

**Typical Manufacturing:** roll fed plotters, grand format



static print  
product (POD)

**Static Print Product:** An online print product workflow where the content is stored in the catalog for ordering to be printed on demand.

**Product Examples:** sales sheets, flyers, and white papers

**Expected Features:** preview the product, order by set quantities, lock down or enable print specification changes.

**Typical Manufacturing:** cut sheet digital or commercial offset depending on quantity



inventory product

**Inventory Product:** An online print product workflow where the content is stored in the catalog for ordering to be pulled from inventory.

**Product Examples:** any printed product

**Expected Features:** ability to track inventory, view what is in stock, and handle backorders

**Typical Manufacturing:** could be anything



VDP: B2B template

**VDP (Variable Data Printing): B2B Template:** An online print product workflow whose template is stored in the catalog for ordering customer branded (B2B) products:

**Versioned VDP:** The customer creates a single version of the customized product (their variable data input via a form is “composed” with the provided template).

**Product Example:** Business card, Marketing Materials

**Personalized VDP:** The customer creates multiple records (each personalized) by adding a list of records to be “composed” with the template.

**Product Example:** Postcard

**Combo VDP:** The customer provides both data via a form and uploads a list, two data sources to create a multiple record output.

**Product Example:** Real estate mailer

**Expected Features:** flexible collection of variable data via a configurable form, apply brand rules, preview of composed products, and view/download low res proof. Controlled brand delivery.

**Typical Manufacturing:** cut sheet digital or commercial offset depending on quantity

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VDP: B2C template

**VDP: B2C Template:** Same core functionality as B2B VDP except that the consumer builds/edits their brand online or chooses from a gallery of template designs.

**Expected Features:** gallery of template designs typically organized by vertical markets (e.g. accountants, personal trainers, etc.). The ability to “design in the browser” change layout, fonts, graphics to build your own designs dynamically.

**Typical Manufacturing:** cut sheet digital or commercial offset depending on quantity

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digital publishing

**Digital Publishing:** An online product workflow where the final product is a digital download rather than a printed product.

**Product Examples:** white papers, personalized sales materials, and presentations.

**Expected Features:** ability to charge or not charge for downloads, ability to track downloads. This can be a product type and/or a feature on an existing product (e.g. a personalized product that allows digital download in addition to ordering a printed product).

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kits

**Kit:** An online print product workflow where the customer can buy a basket of goods contained in a single item (kit).

**Product Examples:** store opening kit, new customer kit, and promotional kit

**Expected Features:** Ability to combine products into a single product, price either as a single item price or the sum of the components, ability to add instructional text for assembly/fulfillment.

**Typical Manufacturing:** could be anything

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promo products

**Promo Product:** A set of products that are branded with a logo for use in marketing or promotional programs, other names include advertising specialties and goodies.

**Product Examples:** mugs, baseball hats, and pens

**Expected Features:** ability to choose colors/sizes specific to the product, ability to view logo placement.

**Typical Manufacturing:** could be anything

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integrated campaigns

**Integrated Campaigns:** The ability to combine one or more marketing channels to create an integrated campaign. Typically includes campaign tracking and metrics.

**Product Examples:** new product launch, sales promotion

**Expected Features:** create a campaign which could include several different channels/methodologies, typically includes tracking and metrics

**Typical Manufacturing:** could be anything



photo products

**Photo Products:** An online print product workflow for creating products utilizing uploaded photos or photos from online collections.

**Product Examples:** photo books, photo cards, and photo calendars

**Expected Features:** ability to upload/access photo libraries, choose from many templates for products, build/design products, and preview.

**Typical Manufacturing:** digital presses



quote request

**Quote Requests:** An online print product workflow for requesting a quote for a print job.

**Product Examples:** all products

**Expected Features:** ability to communicate specifications for requests a quote and potentially upload files, ability to convert the quote to a job (configurable job ticketing).

**Typical Manufacturing:** could be anything





non print

**Non Print:** A catch all for all non-print product ordering. Collection of specifications for non-print product ordering.

**Product Examples:** all products

**Expected Features:** ability to configure the collection of information required to order a non-print product. Configurable job ticketing.

**Typical Manufacturing:** could be anything or no manufacturing at all

Decide what you want to sell and please resist the temptation to say, “everything.” Solutions that do everything usually don’t do anything really well. The key lesson to learn from the pure online players — FOCUS. Don’t assume doing more, offering more, and giving more options is better, it isn’t — it’s just confusing for you, your customers, and your employees.

## Step 3: Define Your Operating Geography

Deploying software in different regions of the world includes more than just language translation, there are cultural differences that need to be taken in to consideration and supported by the software.

For printers who operate in a single culture, for example the United States, this is an easy indicator. One word of warning, don't assume you won't still need to support multiple languages (e.g. Spanish-speaking Americans, etc.). Also, don't underestimate the potential of landing a customer who would like to operate across borders. Many large opportunities have been missed because deployed solutions couldn't support multiple languages or measurement systems.

When evaluating a technology for multi-cultural support, here are some common questions, and functionality you'll want to see:

1. Language translation
2. Local currency support
3. Local tax calculation
4. Local credit card support
5. Measurement system
6. Customer Support in local language and local time zone

## **Step 4: Choose a Business Model — License or Subscribe**

Web technology business models come in two primary flavors: License (own) vs. Subscribe (rent).

There are many pricing strategies within those two models but you fundamentally need to decide whether you want to buy a software license or subscribe to utilize the software.

### *Alignment between You and Your Vendor*

When your business engages with another business, there is an underlying business model that defines the relationship. For instance, when you bought your digital press, the business model was probably based on volume — some monthly base plus a “click charge” when you exceed the monthly minimums.

Business models are important because they either align the partnership or put the partnership in conflict. For example, the most common independent contractor business model is an hourly arrangement between the company and the individual contractor. This business model is in conflict; do you really want to pay for “time-served” or would you rather pay for “results-delivered”? If you can deliver the results in half the time, you’re more valuable. In this business model, the contractor makes more money the longer it takes them to do the job.

Software has some interesting examples of business model alignment vs. conflict. If we simply look at web software business models based on whether they cause alignment or conflict in the partnership — the subscription model wins hands down. A software license is an upfront payment for value/ROI to be delivered in the future, whereas a subscription model is an ongoing payment over the life of the relationship as value is delivered.

A properly aligned business model means both partners win. If your business grows, your vendor makes more money. The print industry has been very skittish towards revenue sharing models on the web, yet there are thousands of examples of printers who have “purchased” web technology licenses and lost 100% of their investment. They paid upfront for future ROI that never materialized.

Calculating total cost of ownership isn’t enough, we need to consider if the overall business model aligns between my business and the business of the vendor? For example, paying a large licensing fee upfront incents the software vendor to move on to the next deal. Whereas a subscription model creates an “earn your pay every month” scenario that better aligns the printer with the vendor.

### *License Software*

The software licensing model has the traditional way all software was sold. You pay upfront for the software, you can

use it forever. If you want to continue to get updates, you sign up for the annual software maintenance program, typically about 15%-20% of licensing costs annually.

Ownership is a funny word to use in this context because the product isn't a static physical product like furniture — software has to keep moving. Not just to add features but to keep working, especially on the web. All web products have to operate on top of the internet infrastructure which may be the fastest changing infrastructure ever created by humans. Every single time a popular browser (there are four of them now) changes, your vendor needs to evaluate their software to assure full functionality against the new browser version.

The software licensing model isn't going away; it's still appropriate for some applications, but the overwhelming trend for web applications is to move to a SaaS business model.

### *Leased Software (SaaS)*

The SaaS model is based on a subscription; you typically pay a monthly fee to use the software. The key difference for the vendor is that if they've architected their product correctly, they are serving up a single instance of the code (true multi-tenant). This greatly reduces their support and maintenance costs as well as it allows them to move the product forward quicker because they have essentially removed the need to

support legacy versions. All customers operate on the same version at the same time, all customers get upgrades at once.

Because the internet infrastructure is constantly moving, the SaaS model aligns better with the ability to move with it. The business model better aligns with your return on investment. You do not typically pay a large sum upfront for the software; you pay as you utilize the software. The more you use it the more you pay (pay as you grow). This business model builds a partnership between the customer and the vendor, the ROI is aligned in the partnership to keep everyone focused on mutual success.

## Step 5: Evaluate Your Team

You can't simply buy technology and expect it to do the work, someone on your team has to own and drive the project, especially at the beginning. This person might already be employed by you, look carefully and don't assume high technical skills are necessary. Leadership, passion, optimism, and critical thinking are more important. Virtually anyone you put on this project is going to experience a learning curve with the product, find someone who is a self-starter and let them grow.

As you've seen in the previous steps, strategy is critical. Next is your team, and then LAST is selecting the technology platform that supports your strategy and one that your team can effectively execute.

*What team do you need?*

Most human potential is squandered under lame leadership and negative working environments. So before you say, "You haven't met my people. They just can't do this," You need to realize you are co-creating a reality with your people. If you don't believe in them, they don't believe in themselves. Don't forget to take responsibility for your part in that reality.

**Is it true that new skills are needed? Absolutely.**

But the catch here is “new.” This whole online ecosystem is new; not because it was invented yesterday, but because it’s being reinvented daily! Skills aren’t the issue. Inspiration and encouragement are the key ingredients. Find a way to infect your team with a willingness to learn because the learning never ends. The rate of change in the online world has proven it will continue to change at ever increasing rates.

There are a couple of roles in the online world that are worthy of discussion because they aren’t familiar to most print manufacturing operations. These roles are not necessarily new hires; they can be filled by existing resources that can grow into the role organically.

### *Product Manager*

The product manager role is typically found in a software or technology company. They are the “quarterback” of the product — providing overall direction and most importantly, translating sales/business requirements to features for development/engineering.

Why would you need the role of Product Manager inside a print organization? More and more of your business is technology-enabled (order entry/Web2Print, Print MIS, production workflow, finance, etc...).



Here's what I see as a Product Manager's role inside a print organization:

- 1. The keeper of the technology vision** (business process roadmap) for the overall business — a living document to adapt as the business and technology evolves. Don't get too bogged down in the technology — keep the vision in terms everyone can understand.
- 2. Focus on the big picture of overall business process workflow** (order entry to invoice), probably through a couple of different technologies (Web2Print, Print MIS, production workflow, finance).
- 3. Communicate the business needs to the developers of the software solutions** you use. This could be your in-house development team or the vendors you've purchased the solutions from.
- 4. Evaluate new technologies** that might enhance your business process.
- 5. Assist with the sale** when it is technology-focused.

#### *Technical/Marketing Sales Support*

Most technology companies organize their sales teams around pure "hunters" (sales resources) and then sales engineers (technical sales specialist) who demonstrate the product and generally answer technical questions during the sales process.

The print business now requires a solution sale, and the mistake a lot of printers make is pushing the entire “solution sales” initiative on their “hunters.” Same thing happens with all this talk about becoming marketing service providers; the marketing solution can’t come from the sales resources only. A technical sales specialist or marketing specialist is a great role for a member of your team to evolve into or new position to create.

Here’s what I would envision as the role of a technical sales specialist or a marketing sales resource in a print organization:

- 1.** Review existing customers to look for technical/marketing opportunities to grow your existing customer base.
- 2.** Identify or “productize” a solution within your existing customer base and then work with the sales resources to find more “like” opportunities.
- 3.** Assist/accompany sales resources on sales calls to offer marketing and/or technical resources to close the deal.
- 4.** Look for new products/services that leverage existing print capacity.

## Step 6: Choose a Technology Partner/Vendor

The technology is the enabler, not the strategy. If you have completed the initial steps to creating your online strategy, the technology decision is easier because you will be able to eliminate a lot of choices before you begin the evaluation.

The top (3) priorities for choosing a Web2Print solution:

### Priority #1:

Ease of Use

### Priority #2:

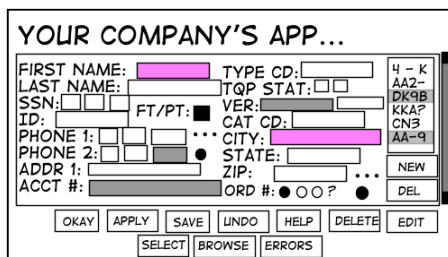
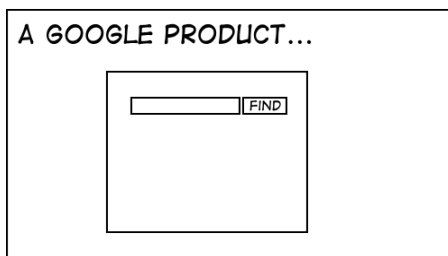
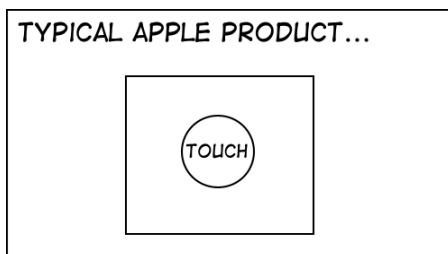
Ease of Use

### Priority #3:

Ease of Use

If your customers can't use it, who cares about anything else?

Simplicity overrides functionality—less is more.



STUFFTHATHAPPENS.COM BY ERIC BURKE

After ease of use, the technology has to meet the specific requirements for:

- **your target market**
- **the products** you want to sell online
- **the geographies** you need to support

The overburdened, complicated application wins many times in the feature war, the problem with that is that nobody can actually figure out how to use it.

*Simplicity sells, simplicity gets adopted,  
and simplicity beats out features everywhere  
EXCEPT the sales process for choosing a technology  
partner. In that arena our brains can't get past  
the compelling belief that "more is better."*

## Step 7: Create a Change Management Plan

How are you going to change the mindset of your organization to bring self-service ordering to the forefront? You need a plan, not a complicated, esoteric plan; maybe it's as simple as this:

1. Schedule an all-hands meeting to describe the online strategy, the selection of the partner, and the planned rollout.
2. Ask for people to submit questions (anonymously) before the meeting. No matter what is submitted, create many questions about the fear that nobody wants to talk about.

*“Does this mean you’re replacing all the CSRs (customer service representatives) with the technology?”*

*“Does this mean I don’t get to talk on the phone with my customers anymore?”*

*“Does this mean we’re competing with VistaPrint now?”*

*“Does this mean all estimates will be done automatically and you’ll need half of the estimators you have today?”*

*“Will sales representatives be replaced by Google AdWords?”*

3. Address each question calmly and directly. The more you address unspoken fears, the less your people will have the opportunity to make fear scenarios up. All answers are

about staying competitive, providing customers more convenient ways to interact, and reducing the amount of busy work your highly-skilled staff does so they can focus on the really complex, important stuff.

4. Track the percentage of your online business. Even if that number is 0%, track it publically, update it regularly, and set a target. Communicate what that target means to the business: “We saved \$XXXX by allowing our customers to order in a self-service fashion,” or “We are X% more efficient due to online ordering and the automation it provides.”
5. Explain separately to every functional group in your company how moving to online ordering changes their job. If you don’t address it specifically, they will imagine the worst and fear will be the driving factor in their story.
6. Explain what each functional area can do and will be evaluated on to make this transition successful.
7. Post and communicate regularly the business results that are expected from this transition. Don’t track technical activities (e.g. system is implemented — who cares?), track business results (e.g. first live order processed through the system).

A change management plan is required for success; don’t underestimate the power of your people to assure your failure

no matter what the strategy or the technology. Your people hold the keys to success, if they embrace it, you can't lose. If they reject it, you can't win.

## **Evaluate Your Current Solution vs. New Strategy**

What if you already have a Web2Print solution? It's time to evaluate your current online solution against your new strategy. A lot of printers went shopping for technology first and are now circling back to discover their initial purchase might not have been ideal for their needs.

Web technology has a way of "blinding through exuberance" causing you to buy what looked cool in a demo, but has little relevance to your customers or your business.

What should you ask yourself about your existing solution?

- Does it properly address my online target market?
- Does it support the product workflows I want to offer online?

If your current solution doesn't match your strategy, it's time to consider a change, don't be tempted to force a solution to do what it wasn't intended to do. Brilliantly architected software can be very flexible but for the most part software does what it was intended to do and it's very expensive and frustrating to force it into a role it wasn't intended for.

Many printers have spent hundreds of thousands of dollars trying to force technology to fit into their strategy rather than accepting the fact that a new decision is necessary. Here are a few scenarios that might unfortunately hit a little close to home...

- 1. I purchased a solution that is primarily B2B and I'm trying to "make it work" going direct to consumers B2C.** You're working on a platform that didn't think about SEO from the very beginning, hacked an anonymous shopper role, and is average in the handling of credit cards. Switching to a solution that was built from the ground up to do B2C would have all those critical features as a standard offering.
- 2. I purchased a solution primarily for commercial offset printers and I'm trying to "make it work" inside an in-plant.** You're working with a platform which is clueless about charge backs (your primary payment method in your in-plant), doesn't handle tracking of budgets which is key to your community, and doesn't understand integrated authentication, which is also critical to the secure access requirements in your community.
- 3. I purchased a solution whose primary focus is personalized printing/variable data printing, yet only about 5% of my business is VDP today.** You're working



with a platform which has all kinds of features that don't apply to your current business.

The lesson in all this is don't waste time beating yourself up about past decisions. Move on by clearly defining your strategy and then actively searching for a platform that **SUPPORTS YOUR STRATEGY**. Don't sit through another generic technology demo. Give clear instructions of what you want to see, otherwise you'll get distracted and end up buying the bright shiny "demo-ware" instead of a solution that works for your business, your customers, and your staff.

### *Changing Course Midstream*

Many printers go on and on about how the Web2Print solutions they invested in aren't working for them. They explain why their customers don't like it (too hard to use), why their production staff doesn't like it (too hard to use), and why they aren't happy with the vendor (too hard to work with).

**MOVE ON.** Stop focusing on the "lack of what you want" and start focusing on the solution. If you know it doesn't work for you, then chalk it up to a poor decision and get on with it.

The clock is ticking. Customers are expecting you to deliver solutions not excuses. The hesitation is most common among printers who licensed software (paid a large upfront fee to "own" the software vs. subscribing to it). This is another

reason I don't like the licensing/ownership model for software — switching solutions is painful because you feel trapped by that large upfront investment.

How do you know when it's time to move on? If your customers categorically reject the solution, you picked a solution that doesn't fulfill on its #1 requirement — a self-service order entry tool. Don't make that mistake again. Usability is the #1 requirement for Web2Print.

If the only reason the product is still around is because you paid a lot of money for it, then you know it's time to move on. Large investments do not make something valuable. You would NEVER keep a press that didn't perform or didn't produce print that met the customers' requirements. Why do we lose our common sense when it comes to software?

The Web2Print market is littered with carnage, half-implemented, underutilized solutions that were either the wrong product for the printer or just a poor solution in general. It's time to drive away from the carnage with lessons in hand to make better decisions moving forward. The longer you stew on this, the harder it's going to be to rally the troops behind the next solution. Leaders make bold moves and keep their eye on the future, not the past.



## Chapter 4: Leadership

When we think about Web2Print as a technology project we not only undervalue the critical nature of this transition, we miss out on the opportunity to lead the organization into a new way of doing business.

The success of Web2Print within your organization has more to do with your approach to leading the transition than the technology. It's easy to blame the technology; software is a target rich environment for blame. Nine times out of ten, the root cause of failure has more to do with people and leadership than technology.

### Executive Participation

Many business leaders shy away from engaging in Web2Print projects because they wrongly assume they have nothing to add because they can't participate in the technical discussions. The focus is business, not technology; don't let the technology discussion overshadow the business objectives.

For most printers, moving even a portion of their order entry online is a big change in mindset. This is not a tactical move; it has to be communicated within the context of your overall business. Because virtually everyone that works for you can

relate to ordering online in their personal lives, it's easy to root the value in real life examples.

The strategy your leadership team came up with has to be communicated to the entire team in a setting that allows for feedback and discussion. If this doesn't happen, your people will make up what this means to them personally. What people make up is always worse than the reality of the situation — fear sets in and paralyzes people.

A key to leading your people and your organization into the future is being really honest about where you are today.

## **An Honest Evaluation of the Present Situation**

We spend an inordinate amount of our time justifying yesterday's decisions. "How did we get here?" gets more airspace than "Where do we want to go?" How you got here isn't important; being honest about where you are now and where you want to go is.

So much effort is wasted through meetings, e-mails, reports, documents, and presentations hiding from this brutally honest evaluation of the present situation.

Bold leaders step up and say what everyone knows to be true, "The technology we are using stinks," or "We don't have a go to market strategy," or "Our integration with external systems is a joke."

OK, they may not say it so bluntly, but they say what is really going on. This isn't the norm (nor is it the best way to assure career stability) however, it is liberating for EVERYONE! Everyone benefits from bold leaders because silently, everyone breathes a sigh of relief that the truth is finally verbalized.

Bold leadership doesn't stop there — don't EVER bluntly expose the problem without having a solution ready. If you do not have a solution, you're merely a courageously stupid messenger. What you want is to be rewarded for your courage with the time and the resources to bring the organization to a better place.

## **Technical Activities vs. Business Results**

Technology has a blinding force field about it. Perfectly rational and smart business people tend to lose their perfectly rational selves when approached with a technology solution, project, or topic.

The most common mistake in leading technology initiatives is to track the technology activities vs. the business results you want out of them. No business is actually generated from technology tasks like “move this data from here to there.” Web2Print is a new path for your business. Set out on the path with the objective to measure business results, not technology activities.

*It's so much easier to manage activities;  
it's so much **more effective** to manage results.*

The amount of time served or meetings attended are managing activities rather than results. If you established a partnership to get your print business online, after six months how are you going to evaluate the partnership? I doubt you're going to count how many meetings were attended, and what e-mails were sent. You're going to look at results. You're going to compare where you were before the engagement and where you are today (post engagement).

*If we evaluate success based on results, why do  
manage to activities?*

## **More Coach, Less Boss**

We all agree we're in a time of transition. Virtually everything is changing around us, and the rate of change seems to be accelerating every year, especially when it comes to the digital economy and technology in general.

*Times of transition can be stressful, especially for  
those people who are resistant to change.  
In times like these a coach is better than a boss.*

A coaching approach is based first and foremost on understanding what your people are good at as individuals,

then taking that assessment and layering it over the organization so you can put them in a position that optimizes their strengths and minimizes their weaknesses. Think about a lineman forced into the punters role or vice versa. Someone is going to get hurt!

The crazy thing is, we put punters in lineman roles everyday and then berate them for not being aggressive enough! Why does this happen? It happens because we're thinking like bosses instead of coaches. We think first about what this "resource" can do for us and for the company without first looking at what they are good at. We fit them into a role rather than tailoring a role that fits them. It's a recipe for discontentment on all sides and results in a lot of wasted potential.

A lot of company cultures want you to "fit in" even if fitting in dampens your natural abilities. Do we really want a bunch of talented folks holding back to fit in? No! What the world and most companies really need is for individuals to knock it out of the park.

How do you be more of a coach and less of a boss? Take a moment and really ask yourself, do you know what the individual skills of your team really are? Are you paying attention? Are folks in positions where their natural skills can thrive or do you have a couple of punters playing the lineman position? I believe human potential is the largest untapped

resource in every single business on the planet. We spend great resources trying to create 1% efficiency in our workflow processes when probably 50% of our human potential goes untapped every day.

## **Leadership Out of Poor Decisions**

### *The Web2Print Smorgasbord Mess*

You're not sure when it happened, but one day you woke up and realized you had five different Web2Print solutions all in various states of implementation and a team that was spread too thin. When you pull back and look at the big picture, you realize it's a mess. No strategy, no unifying approach to moving your business online, just a tangle of technology solutions which all need care and feeding, none of which are really meeting the needs of your customers.

When you're in a hole, stop digging. Don't worry about perfectly cleaning up every technology implementation. First, stop creating more messes. This means no more frantically plugging in a solution in a one-off fashion for a specific customer. You have to back up and get the big picture so that when opportunities arise, you have a process for thinking about solutions.



**It is vital that this thinking be done outside the fire drill of a specific customer need or sales process.**

One of the most common mistakes made with Web2Print is making a purchase and evaluation based on the needs of just one of your customers under duress. Sales have a way of willing solutions to appear to fit perfectly because the driving motivation is to simply get the deal done.

### *Lead Your Way Out of the Smorgasbord Mess*

Step back and go through the steps of creating your online strategy discussed earlier in this book. Based on your new online strategy, first evaluate the vendors you have. If they fit the requirements, consider a restart. Be honest about why the solution failed. It's easy to put all the blame on the vendor. A restart effort will go a lot smoother if both parties accept some responsibility for the failure.

Focus on where new customers are going to land. Don't get bogged down in transitioning your clients off of all the technologies, unless there is a "triggering event" that makes sense, such as a financial ramification to the technology vendor or the solution is no longer working for the customer's needs. The most important focus is to choose the platform for the future and start building internal expertise on it so that new customers land in a place that is in alignment with your long-term strategy.

### *Selected the Wrong Technology*

Change, even in the face of overwhelming evidence of the need for change is difficult because it requires you to go from a “certain” state to an “uncertain” state. And even if our certain state is an absolute failure, we tend to feel way more comfortable with the familiar.

Legacy business decisions are complicated. There are usually many people involved and many view a change of course as a stamp of failure on the previous decision. Leaning into uncertainty, rather than shying away from it is one of the keys to success in the digital economy because the rate of change requires you to become very comfortable with not knowing what will come next. One thing I believe that truly does distinguish digital natives from non-natives is their comfort level with the rate of change. They accept it as a “normal” part of their environment.

If you selected the wrong technology path, hired the wrong individual, or chased a market that doesn’t make sense, try reframing the solution, not based on the past investment, but rooted in the future opportunities the alternative can bring. Uncertainty can be harnessed to mean potential rather than paralyzing fear. If you’re the leader, it’s your call.

### *Lead Your Way Out of the Wrong Technology*

If you don't have the right solution, stop obsessing about the lost investment. The longer you wait to move on, the more you're falling behind. Don't let yourself be delayed because you're angry with the vendor. Ask yourself: Is there anything the vendor could do to repair the relationship? If you can't imagine ever trusting them again, then move on now. Take note of what you could have done better (actually ask them), and then take that expensive learning onto the next vendor/partner. Don't repeat your side of the mistakes.

### *Bad Timing or Forced Timing*

A lot of Web2Print solutions are sold with printing equipment through major print engine manufacturers — Xerox, HP, Kodak, Ricoh, Canon, Konica Minolta. Each of the major manufacturers has partnered with one or more Web2Print providers so they can offer value around the engine, from procurement to production workflow. The decision to buy direct or through a channel partner depends on your needs. In a traditional software licensing deal, the print engine companies can bundle the solution and provide you financing.

Purchasing through the equipment manufacturers can bring other advantages of working with a single partner, unique integrations to the vendor's workflow solutions or engines, and access to local expertise within the channel partner that the Web2Print vendor might not be able to support.

A word of caution: Don't buy the wrong solution because it's cheap and can be financed, or because it gets thrown in for free with an engine deal. Plenty of bundled in Web2Print solutions are never properly implemented. One concern is that buying a new engine is a lot of change already; do you have the resources to handle all the change at once? If you find the right solution and the timing works to combine the purchase to get a better deal, then go for it. Just remember, the Web2Print solution deserves (and requires) dedicated attention to succeed.

### *Lead Your Way out of Bad Timing*

Making a strategic decision under duress can have long term ramifications. The key to moving past this mistake is to look forward, not back. The investment was made and the lessons have been learned. Leadership is more about not repeating your mistakes and less about avoiding all of them. The right time to make a strategic decision, like Web2Print, is when you have the time to create your online strategy and think through the larger ramifications to your business.



## Chapter 5: Implementation

There is a general acceptance inside the print industry of poor technology implementations. Most often, the technology vendor takes the majority of the blame. In most cases, blame could be divided equally. The whole approach to implementing technology has been hijacked by the technologists, when in fact its way more about people, leadership, and change management than technology.

Pick up any technology implementation plan and you would assume that if all the steps were followed, 100% success would be guaranteed. The problem is that the steps that really count — change management, leadership, and strategy — aren't in the document and the people sent out to implement are technical resources, not people resources.

### Define Wild Success

Yes, not just success but wild success. The word “wild” makes most people nervous. Before you start ANYTHING, define and agree upon what would be a crazy, wildly desired outcome. What you'll find out is just how much your team is defined by their limiting beliefs. They can't even consider “wild success” because their “reality filter” is so powerful; they find it silly to

even consider outcomes that don't fit into their current understanding.

Leadership has to help. Wild success doesn't mean imaginary or not rooted in reality, it means extending your limiting beliefs a bit past your comfort zone.

### **Some examples of wild success with Web2Print**

- **First live transaction** through the system (order entry to invoice) **within 1 month** of purchase of the technology.
- **Sales can do their own introductory demonstration** of the solution **within 1 month** of the purchase of the technology.
- **Self-service order entry via the web is 25% of all orders** in less than 7 months from the purchase of technology.
- **Your sales team leads with web-enabled tools as a differentiator** because they feel confident in your ability to deliver the solution in a timely and reliable fashion.

### **Who Implements on Your Team?**

A lot of Web2Print solutions get delegated to pre-press, which makes sense. It's a technical group, and they understand the nuts and bolts of getting things to print.

Here is why I think you also need a less technical, less print savvy resource on your Web2Print implementation team. Your customers are not technically savvy, nor print savvy for the

most part. You want to have someone in your organization that can faithfully represent your customer; maybe a customer service representative. Look around your organization for someone who is most like the END-USER, that is, the people who will be ordering the print not the person signing the checks.

Because Web2Print is sold as business process improvement, printers are frequently told that Web2Print will reduce their labor costs. This can be true; however, the problem with this statement is that it clouds the real need for dedicated ownership to get the project off the ground. The vendor isn't going to implement this thing for you. They cannot own it. Your team must. The skills required for this ownership are more leadership and business skills than technical skills.

## **Keep the Customer's Perspective the Top Priority**

Remember, Web2Print is primarily for your customers, not you. It's not about you, your workflow or your preferences because the only path to success with Web2Print is through mass adoption by your customers. The one aspect that kills the success of the project every single time is lack of customer adoption; therefore, it's critical that you keep the customer's perspective top of mind at all times.

How do you keep the customer's perspective front and center? The easiest and most obvious answer would be to

involve them in the process. Find a customer who is willing to walk through your ordering process and give you feedback. Test the ordering process out on other people in your life who aren't print experts.

Web2Print is meant to provide benefits to the customer. This means it has to be easier and more convenient than ordering in a full-service manner. In every decision, ask yourself and your team, "How does this impact the customer?" In every feature/functionality decision, determine how this adds value to the customer's experience.

Because Web2Print technologies are sold to printers, the focus is on how it's good for the printer and not on how it's good for the printer's customers. It's your job to keep the focus where it belongs, on the customer.

## **Get Real Fast**

Get a real transaction from a real customer who sends a real print job that gets printed by a real operator on a real machine and gets a real invoice. Get REAL. Why? Because until you go through a real transaction, you don't know what's preventing you from full launch. All you have are theories. Theoretical problems keep you from getting to the real obstacles that are blocking a full launch. And, typically these don't reveal themselves until a real transaction makes the journey (or tries to) from order entry to invoice.



Implementation is a small but crucial part to the long-term partnership — this is your time to connect directly with experts at the vendor, DON'T WASTE IT. This is why the timing of the purchase is very important. Buy the solution when you're ready. The vendor will always want to sell it now, but make sure your ducks are in a row before you sign up because your long-term success with the solution is often determined during the implementation phase.

Opening a new door to your business is 25% technology and 75% people. Don't let anyone tell you these things run by themselves. You need leadership from your side (probably dedicated, at first) to get it off the ground.

## **Why Pilot?**

A pilot is a trial run, a way to prove or disprove your assumptions and theories in a live environment. Jim Collins' new book, *Great by Choice: Uncertainty, Chaos, and Luck-- Why Some Thrive Despite Them All* (2011, Harper Business), provides excellent advice on how to get empirical data through small investments — he calls them “bullets” — before you spend a lot of your resources on big projects — he calls them “cannon balls.” This is great advice for printers who are moving into the online space. Don't fire a cannon ball first. Don't invest in a huge complex system, launch with thousands of products, and spend two years on implementation. Fire a series of bullets first, and test your assumptions with real

empirical data. Try the subscription model, test with a single customer, try out a few products, learn about web analytics, monitor activity and user adoption, rinse and repeat with what you've learned.

Bullets are cheap; you can fire lots of them.

Cannon balls are expensive; you might only get to fire one that doesn't work.

### **Top 3 Reasons to Pilot:**

#### **1. Provides full context**

Everyone learns how the solution will impact the overall workflow.

#### **2. Uncovers critical roadblocks**

Move a job from order entry to invoice, and you'll find what's really keeping you from launching.

#### **3. Access to customer feedback**

The Web2Print solution only works when customers get their hands on it and find out where/if they get stuck.

## **Get It Moving**

You spent the money. You spent the time in the sales cycle. Why is it taking so long to realize the ROI that can only be obtained from a full implementation and ADOPTION of the solution throughout your organization?

There are many reasons for slow implementations. No need to list all of the challenges here — most of them falls into the “excuse” category anyways.

What if you changed the focus from dreaming up a comprehensive list of everything you should do to an approach that asked, “What are the FEWEST steps needed to get to a successful transaction?” Instead of looking for everything, find the simplest path.

I’m not saying toss out your comprehensive list. But in reality you’re not going to do everything, no project ever does. So why focus on building a comprehensive list of everything, when all it’s going to do is capture a significant amount of work that will be left out. (And imagine how you’re setting yourself up to under-deliver to the folks who wrote the checks?)

A monster-list approach is overwhelming and sets the project up to be in a constant state of under-delivering. A minimum-path approach sets the project up to get to a state of accomplishment as quickly as possible with laser-targeted prioritization. Until you get a real transaction through a system, prioritization is nothing more than theory. Getting real is the best way for your priorities to reveal themselves.

This approach is a combination of several different ideas. Minimum viable product or MVP is from the web 2.0 software world and states that you should ship your new software product as fast as you can because admit it, you have no idea how the customers will actually use it and what they really want. Get to that “real feedback stage” as quickly as possible.

David Allen writes about project management in *Getting Things Done: The Art of Stress-Free Productivity* (2002, Penguin). Allen says projects should be managed from the objective backwards. For example, if your objective is utilizing new Print MIS system to run your business, and then ask yourself, what’s the next most important action I can take to get me closer to that objective?

Finally, there are Seth Godin’s ideas around “shipping,” which I think are brilliant because he addresses what’s really keeping us from moving beyond the theoretical challenges — fear of change. It’s so easy to create reasons to postpone going live with a new software solution. Software is a target rich environment for excuses! Fear of change is the real block for most projects. We are comfortable with what we know and do today, and uncomfortable with new processes that force us out of our comfort zone, even if they offer significant value. Don’t underestimate the power of fear to be the underlying cause of delayed launches. It’s hiding underneath the list of 44 changes you need to make before the solution can be launched.

## Implementation Mistakes and Fixes

### *MISTAKE #1: Lack of User Adoption*

You won the deal, and you implemented the B2B private portal solution, but there is very little traffic on the site even though you bid the deal based on the volumes your customer quoted. Understand that even in business to business portals, the solution has to be promoted in order to drive adoption.

Bring the topic of promotion of the site into the sales process. Ask your customer how the users will find the services? Will there be a link on their intranet near where they procure other products and services? Can you integrate the login so users don't have to register?

### *FIX IT: Lack of User Adoption*

**Reduce the number of steps for the buyer:** For every field you add to a form in an e-commerce user experience, your conversion drops 20%. The best way to grow adoption of Web2Print solutions is to decrease the number of steps between the user and the transaction.

If you've deployed a private B2B portal for a customer, walk through the workflow from your customer's perspective. This might require that you go to their site and experience the solution from inside their network. Is there a link to your solution on the company's intranet where employees are likely to search for printed services?

Once they find you, does your solution require the user to register with you or have you integrated with their authentication systems to eliminate that step for the user? Count the number of steps a user has to take to order from your Web2Print solution. What steps can you remove?

**Incentivize your frontline employees to convert users:** After you've launched the Web2Print solution, some customers will continue to submit work through e-mail and FTP. Create a plan for addressing these customers in a manner that sells the value of the Web2Print solution to them. This requires that your team act as evangelists of the technology. If they don't believe in it, it will never get traction.

Because Web2Print is a self-service alternative to manual ordering processes, don't underestimate the common reaction, "This is going to remove the need for my job." Address this concern upfront with your employees and make sure they know that embracing the Web2Print solution is critical to your online strategy and the health of the overall business.

**Set goals and track progress openly:** Partner with your customer and set goals for user adoption of the new tool. Track the metrics openly with your team and your customer. The saying, "what gets measured gets done," couldn't be truer for Web2Print solutions. If you implement the system and nobody uses it and nobody seems to care, you not only have

wasted time and money, but you've also lost face with your customer and your employees. If you build it, they will come DOES NOT apply here! You and your customer have to take an active role in driving adoption of the site in order to achieve real return on your investment.

### *MISTAKE #2: Lack of Resources*

Launching a Web2Print solution is a major project, you have to staff it for success. This staffing has to include a clear leader from your side who is both accountable to and incentivized by the business objectives you created in your online strategy. Don't give the Web2Print project to your best employee who already has three full-time jobs. This requires dedicated attention out of the gate.

Web2Print is a fundamental change in the way you do business; it's not a one-time purchasing event. The vendor simply provides the technology to enable YOUR ONLINE STRATEGY. Vendors are not there to create, manage, or execute your online strategy. Somebody on your end, and possibly multiple people depending how large your organization is, has to become an expert on the enabling technology so that they can use it to execute on your online strategy.

When Web2Print vendor's sales people tell you that Web2Print will reduce your labor costs, they mean this is a

long-term goal of overall automation. In the short term, you need qualified people to execute your online strategy.

*FIX IT: Lack of Resources*

Make e-commerce a priority in your business and give it dedicated and qualified resources (at least to get it off the ground). Create an incentive program that gives clear responsibility (ownership), accountability, and the time to make it happen. If this seems impossible in your current staffing arrangements, it's easy enough to segment responsibilities within the e-commerce strategy and give them to several people in your organization. Make sure you set up a weekly meeting to facilitate collaboration as all the pieces have to work together.

*MISTAKE #3: Overly Production-Focused*

Your online business is about changing the way you interact with your customers; don't let the project get hijacked by production needs. Web2Print has to be about providing the easiest, most convenient, and most competitive order entry solutions for your customers. Your Web2Print solution should also be a major tool for your sales team to win new business. Customers don't care how this solution makes it easier on you as a printer. Customers care about saving time and getting what they ordered when they ordered it.



### *FIX IT: Overly Production-Focus*

Bring the customer's perspective as the highest priority. Drive your business decisions based on customer metrics, how the customer is using the site, where they are getting stuck, trends in users and usage — this is the data that should determine how and when you deploy resources to improve the solution.

### *MISTAKE #4: Configuration Paralysis*

Configuration paralysis is when one or more members of the team says, “Let's just change this one last thing before we move forward,” and then another last thing, and then another. And now you've had the solution for twelve months and not a single customer has placed an order. There are obviously some good reasons to “tweak” before you launch something new to your customers (e.g., pricing accuracy or access to correct file assets), but endless delays mask a deeper issue — folks are scared to open up the new door to their business.

### *FIX IT: Configuration Paralysis*

Once you've made the decision on a vendor, don't turn back, and don't try and configure the selected solution into an amalgam of all the solutions you saw during the vendor selection phase. Make the solution work. It will not be perfect; there is no perfect solution out there. Launch it. Too many Web2Print solutions are in perpetual configuration stages. You

don't get ROI configuring the solution, and in fact, you're eating into your future ROI the longer you tinker with it before you actually open it up to live transactions. You don't need to think through every conceivable exception, you're automating the easy stuff, so you can handle the exceptions manually.



## Chapter 6: Technology

So much of technology marketing and sales is centered on the lowest meaningful attribute (the feature). There are endless feature matrices comparing the specific details of every solution — when we dig into the details we feel we’ve done our

“due diligence” in the selection process.

The challenge with this approach is that an intense focus on software features can limit your attention to the really important stuff, like the right partner with the right vision and the product which is the easiest to use and has an architecture that is flexible enough to evolve and scale with you and the ever changing internet ecosystem.

Here’s where it gets interesting. If you choose the product with the most features and it turns out to be too hard for anyone to use in a self-service fashion, nobody is going to use those features anyway. More features can sometimes mean more value but it ALWAYS means more complexity. Simplicity is hard. But simplicity wins.

Even if software features aren’t ever used, they add to the overall complexity of the solution. When solutions get

complex, they move slower (fewer versions) and they get harder to test (more overall code).

Here's something that should not surprise anyone, that Web2Print industry feature matrix you're staring at, it was filled out by the vendors. They will do back flips in reasoning to check "yes" on everything; do you want to be the one vendor in the matrix that doesn't support cross media campaigns in double-byte languages?

How the heck is a printer with limited time and expertise suppose to evaluate a partner, architecture, usability, and product vision? You're smarter than you think, technology isn't as complicated as it's made out to be, it's just been advantageous to confuse people by overwhelming them with technical jargon.

## **Buying Factors that Really Matter**

### *Top Factors for Evaluating Web2Print Solutions*

#### **Usability**

OK, this one is easy, you have current customers (B2B), ask them to try and use the product BEFORE you buy it. If they can't figure it out, it's not usable. If you're diving into the B2C world, ask a relative, friend, anyone outside the print industry to use it (without guidance) to test its usability. Test it against the online competitors. Don't let your pre-press/production people be the judges of customer-facing usability, people get

print knowledge embedded in their heads permanently and they can't take the expert hat off to step into the shoes of someone who has very little print knowledge (your customers).

## **Partner**

Are these people you want to work with (skip the technology stuff, do you trust the people and the company?) Seriously, this is a partnership, not a one-off sales interaction. Get a sense of the team, not just the sales rep. Call the support desk (make it near closing time), talk to current customers and see how they are treated after the sale. Maybe try and find current customers yourself rather than asking for the referrals list? Lots of Web2Print installations can be found by their product name by searching on the web.

## **Architecture**

This one can be trickier. A lot of people think architecture is what platform the solution was coded on (Java, .NET, Rails, PHP); you can execute good and bad architectures in any programming language. Architecture, in my opinion, is how the solution is organized (relationships between the different entities — print locations, customers, payment methods, products, categories, etc...) and the ability of the solution to integrate with other technologies (extensibility.) Remember, integration is a word used rather loosely. You need to ask

more direct questions: What data is passed? How often? Using what protocol?

## **Vision**

Google's power scares me sometimes, but you have to like the fact that they openly publish their "vision/philosophy." I'm not saying every Web2Print software vendor has to have a documented manifesto, but someone (typically the product manager) is making decisions about what gets in the product roadmap. What is the vendor's vision for the product? Don't accept a list of features as a valid answer.

Web2Print has matured over the last ten years, yet there are still too many (one is too many) mismatches between what the printer needed and what the printer purchased.

Be wary of the Web2Print technology provider who says they fit every scenario for every printer. Again, being good at everything, generally means you're not great at anything.

## *Channel Partners*

A lot of Web2Print solutions are sold through print equipment manufacturers like Xerox, Canon/Océ, Ricoh, Konica Minolta, or HP. Virtually all the manufacturers have partners in the Web2Print space, yet nobody does a good job of clearly defining which solutions fit best with specific printer's needs. The proposed online strategy approach in this book offers a remedy to this solution. If you simply determine your target

market and choose the product workflows you want to support online you can avoid most of the common purchasing mistakes.

*Common Purchasing Examples:*

- A large copy center chain was sold a solution that was best suited for a single location commercial printer. The chain has the wrong product set, no ability to scale, and no ability to support multiple locations — in other words, a real mess.
- A single location commercial printer was sold a solution that was best suited for a copy center. The printer has no support for its print product types or its primary print manufacturing — really frustrating.
- An in-plant was sold a solution whose main focus was variable data products when 90% of its business is office document printing. The in-plant has no ability to support its current customers and software with no knowledge of the intricacies of supporting an in-plant environment — a real waste.

What a waste of time, labor, and money at a time when nobody in our industry can afford to waste any of these precious resources. Everyone loses. This sale is going to be an on-going headache for the entire food chain — channel partner, sales resource, technology provider and finally, of course, the printer and their customers. While Web2Print can

differentiate you in a sale when it goes right, when it goes wrong, it can get you kicked out of the whole deal.

What can we do to avoid this? We can all be a part of the solution. Here are my suggestions for each of the stakeholders.

**Printers:** Please get clear on your online strategy BEFORE you go shopping. If you enter the vendor selection process with no strategy, one will be “invented” for you. This strategy will be an amalgam of every sales pitch you hear — focusing you on what the vendor believes are their product’s strengths. This focus frequently has nothing to do with your business needs or your strategy.

**Web2Print Providers:**

Resist the temptation to sell your product to anyone who will give you money. There are a few excellent recent examples of companies who did this, and their long-term outcome was bankruptcy. At some point, your dissatisfied customers will overtake your operations, and you can’t sell enough to keep up with the support costs.

**Channel Partners** (equipment manufacturers)

Please provide clear direction to your sales teams so they can match the challenges they uncover with the right solution. This is NOT a feature matrix. I don’t accept the excuse that you can’t publish this differentiation because the vendors



want to say they work in every situation. Who is in charge of your channel? You or your partners?

**Sales Resources** (channel partners, W2P technology providers)

You have to listen to and understand what the printer's online strategy is before you recommend a solution. Don't assume all printers are the same and understand that all Web2Print solutions do not solve the same challenges.

## Choosing a Partner

Have you ever heard the phrase, writing the check was the easy part? Reviewing and selecting a vendor is an important piece of the overall puzzle, but it isn't the whole puzzle. Because you will be going into the purchasing phase with a clearly articulated strategy, purchasing will be a matter of finding the vendor that best suits your strategy, not looking at the vendor who wins the "most-features" game. At some point, a software solution's features start to bog it down, and actually make it a more cumbersome product to use. Look at the tool bar in Microsoft Word! 90% of people just want to type a few paragraphs, and the tool bar shows them 500 things they don't want to use but will be forced to think about when they click on it by accident.

After you've narrowed down your vendor option to a few whose solutions actually meet your needs, here are some important considerations in making a final decision:

## Purchase Recommendations

1. During the sales process, call the vendor's support desk with specific product-related questions. Support is the long-term relationship; give support the focus it deserves.
2. Get a customer involved to assure that your customers will be capable of ordering from this solution. You're looking at zero ROI if your customers can't figure it out.
3. Request copies of documentation to see what you'll need to learn to be self-service in your use of the application. If the ordering process requires an instruction manual, it's not a self-service on-ramp.
4. Ask for references. And ask the references about how upgrades work, about support, system outages, and roadmap progress.
5. When you request a demonstration of the product, give specifics on what you want to see, instead of hearing the generic pitch.
6. Ask specifics about the short and long-term product roadmap. This gives you a chance to get a glimpse of the strategic vision (whether they "get it") and to understand what's not in the product today.

Now make the vendor a partner. A lot of printers complain about current Web2Print solution. They have valid complaints, but the undertone of the conversations is, "What has my vendor done for me lately?"

If your Web2Print technology provider is a true partner, then you wouldn't be looking for what they should give you, but how you can win together. The successful printers in this space have essentially adopted their technology partners and made them an integral part of their strategy. I've heard vendors say about their key customers, "They have helped us take our product and service to another level."

What does the technology provider get in exchange?

Technology companies live and die by the referral — they get a valuable reference customer, incredibly feedback on how to improve their product, and most importantly, a collaborative working relationship with their customers.

Before you start pointing fingers at flawed technology or poor customer service, take a quick look in the mirror and ask, "How easy is my organization to service? What could we do to be a better partner?" If you want your technology partner to be responsive, what can you give them in return?

## Features

When you shop for a car do you start with careful examination of the tires? No, of course not, you are usually either a "how it looks/feels" person or a "how it runs/handles" person. When we shop for software why do we dive into the weeds of features instead of carefully evaluating how it looks and feels or how it runs and handles?

Features are compelling, and for the most part, easy to understand because we put them into a binary spreadsheet (on or off, yes or no). Isn't it funny how we have a critical component such as, file upload, and we just leave it at yes or no? There are millions of ways to approach file upload: some of them complicated and slow, others elegant and fast.

Let's take our collective heads out of the feature list and shop for what really matters — in order of importance:

Is the solution easy enough for your customers to use it in a self-service fashion?

Was the solution built in a way that supports the business of print? In other words, did the architects get the relationships right?

Can you administer the site and set up new customers easily without relying on the vendor?

When shopping for technology, keep your focus above the feature level. Features constantly change, and more does not always mean better.

*This creates a dilemma. Prospective buyers are likely to base purchasing decisions on perceived value, typically interpreted as “more is better.” Yet, the buyer’s employees and customers will base their satisfaction on usability, where less is better.*

How does a product manager entice the prospects and satisfy the existing customers?

Virtually every software product development cycle I’ve been a part of in the last two decades has centered on a single topic: add more features. Our efforts resulted in short term sales, but a long-term decrease in our product’s overall usability.

Every single feature you add to a product, even if nobody ever uses it, adds complexity and could potentially get in the way of someone trying to accomplish something. This is why documentation and online help inside software applications has ballooned to thousands of pages. Who has the time to commit to this learning curve? What product is worth this much work?

This isn’t an easy dilemma.

Instead of thinking about your product or service offering through the single lens of “add more,” think about how subtraction can make your product/service more appealing.

What can you simplify? What can you remove?

## **ROI (Return on Investment)**

In any business decision, investment decisions get weighed against returns or ROI. Moving your business online is a business decision. A Web2Print solution is an investment; hence, you should understand how you will measure your ROI before you invest.

One of the most important aspects of ROI is the timing. When do you let go of your money vs. when do you see the return?

Timing is key when calculating ROI because when printers and vendors are aligned (i.e., the vendor gets paid when printer gains value from the solution), there is a much better chance of a partnership. Now don't rush to the conclusion that a monthly subscription solves everything. I've seen lots of Web2Print software subscriptions get sold, printer starts paying, and the solution isn't providing any value. Monthly payments are better than all upfront payments where the printer has given away all leverage in a single transaction. But monthly subscriptions can still go awry with the vendor getting paid while the customer isn't realizing any return.



## Chapter 7: Integration

Integration might be the most overused and misunderstood word in technology today. There is a gigantic gap between what we want integration to mean and what integration is in reality. We want

integration to be two systems acting as one, but sometimes all we get is a few pieces of data passed in one direction at scheduled intervals with manual intervention required.

Most likely, you'll see the box next to "integration" checked on that feature list. Check again. In order to do your due diligence, you have to dig a bit deeper. Ask the questions provided below, and make sure you and the vendor are defining integration in the same way.

A better understanding of what "integration" really means can help you with your online print business and the connections between order entry, production management and financial systems.

Let's skip over the technical jargon for now and talk about what you want to accomplish using a variety of technology solutions like Web2Print, pre-press management, production workflow, Print MIS, and financial systems. You may be wondering why there isn't one system that just does it all so

we don't have to be bothered by the integration mess. The software industry tried that and failed. Bigger systems aren't necessarily better, and the larger the software system, the more inflexible it tends to be.

The business process of print can be described as two parallel paths. One path is all about production; the other is all about the business. The production path captures assets like files, graphics and fonts, as well as job instructions. While the business path tracks the use of supplies, labor, pricing, inventory, and everything about the financial transaction between the printer and the customer.

Web2Print begins the workflow and captures a bit of information for both paths. This makes the Web2Print system critical because it has to accurately capture the information and potentially pass it to multiple systems on the backend (if it's deployed in a fully integrated workflow).

Remember, data capture for the backend systems is the **SECONDARY** priority for Web2Print; the **#1** priority for Web2Print is to provide a self-service order entry tool for your customers. There are systems that are excellent at data capture and excellent at the pass off to multiple systems, but they fail in their **PRIMARY** function as a self-service order entry tool for your customers. If your customers don't use your Web2Print system because it's too hard or too complicated, nothing about the integration matters.



## Master Data

Integration is a connection between two systems that enables the exchange of data. The first question to answer in an integration setting is which system is the “master” and which system is the “subscriber” to that data. This is a common misperception with Apple’s iTunes platform. Many people believed that if they lost their iPod, iPhone, or iPad, they would lose all their data. They didn’t understand that the iTunes platform on the computer is the master, and the iPod, iPhone, and iPad are subscribers to that master.

In a print environment that has a functioning Print MIS system, the Print MIS should be the master in virtually every case. The Print MIS system collects orders from everywhere, not just the web; therefore, it makes sense that the Print MIS system would be the master and the Web2Print solution would push data into that system and subscribe to data stored and managed in that system, such as pricing. This is challenging because the Web2Print system and the Print MIS system are often provided by different vendors.

Web2Print is one of many inputs into a printer’s business and production workflow. You want Web2Print to serve its primary purpose – to capture more orders, in a more efficient manner, and be a source of competitive advantage for your sales staff. The Web2Print system should then gracefully hand off to the production management systems and the financial

systems so that an order from Web2Print is treated like any other order once it's in production.

## Top Integration Questions

Here are some really good questions to ask about any integration project:

1. What data needs to be shared between systems?
2. Do both systems define the data the same?  
If not, can you map?
3. How often is that data sharing required  
(from real-time all the way to manually done monthly)?
4. Does the data need to be one-direction or bi-directional?
5. What is the preferred method or tool set  
(e.g., web services)?
6. Does either system have a well-defined API for this type  
of transfer?
7. What is the preferred data format (e.g., cXML)?

Asking these questions and answering them honestly will help you control the scope of integration projects. Very few systems require real-time, bi-directional integration which happens to be the most complex and expensive. Don't overlook the power of scheduled exports and imports. They frequently provide sufficient functionality and are almost free in most cases!



## Chapter 8: Workflow Automation

Automation is an enticing word; it's best used as a descriptive adjective rather than a noun – an “automated” workflow. Automation isn't the definition of your process. You

create your process first and then find ways to automate it.

Digital production workflow has changed over the years along with everything else. The core concepts have remained the same: define a process; communicate that process; follow that process for at least 80%-90% of your work; document exceptions and regularly assess when exceptions become standards and require an adjustment to your standard process.

### Adding Web2Print to Your Workflow

One of the biggest changes to digital production workflow is the introduction of a Web2Print system. Order entry begins the workflow, and an order entry system which can intelligently convert files to PDF, pre-flight files, and collect job specifications in a structured manner SHOULD greatly impact the production workflow downstream.

Automation is more realistic now that order entry can provide a better prepared file and a structured job ticket. A Print MIS system should take care of capturing the inputs into the job (labor and materials) and passing the financial information to the accounting system. What's left for digital production management to do? It must gracefully move assets (files) from order entry into the production workflow with as few manual touches as possible. Just as Web2Print systems are providing more and more value upstream, the RIPs or DFEs are increasing their value through hot folders that can be scripted to automate workflows like booklet making.

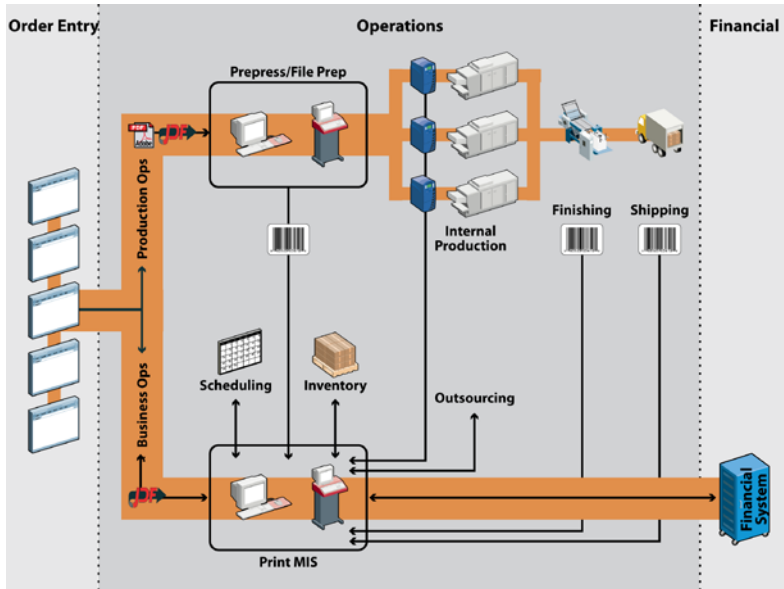
When looking at digital production workflow, make sure this is something you have documented before you shop for a Web2Print solution. Then accept the fact that a new order entry system should impact your workflow for the better. Whenever you add Web2Print, new RIP, or Print MIS, review the workflow again. Each addition to the puzzle should make an impact and give you the opportunity to look for ways to automate and/or streamline the process.

The business process of print spans the needs of several technology solutions. Whenever multiple technologies exist, there is potential overlap and the need for integration. Get clear on what each technology's core purpose is, and then determine your source of master data throughout your workflow.

When you manage your entire print business process electronically, you could have many technologies in your workflow. The business process of print falls into three main areas: Order Entry, Operations, and Financials. Within the operations area, there are two parallel paths: production workflow and business workflow.

The intent of the production workflow is the manufacture and delivery of the printed piece.

The intent of the business workflow is to collect the data necessary to make better business decisions by monitoring, tracking, and measuring the use of resources (labor and supplies) throughout the production process and then passing the transactional information to your financial system.



## Web2Print & Print MIS

Let's look at the two major software solutions offered inside print operations: Web2Print and Print MIS (Management Information System). Over the years, a lot of Web2Print solutions have added both business workflow functionality, as well as production workflow functionality. There is nothing inherently wrong with this feature creep into areas other than order entry – it just gets complicated when the printer now has multiple places to do the same thing (e.g., imposition or cost calculations).

Feature creep is a side effect of how the industry is lined up to sell Web2Print. The vendors sell to printers, but Web2Print

solutions are built for the printer's customers. Printers are printers, so they focus on production and business features. And unfortunately, we have Web2Print solutions that start to look and feel like they were built for printers. If they were already perfect for the customer, this wouldn't be a problem, but they are far from perfect for the customer. Trying to please the printers is distracting them from working on the real value required – brilliantly simple order entry for novice print shoppers.

We know our customers are not print experts, and the trend is less and less knowledge about print as the print buying decision gets more distributed. It's so hard to resist the temptation to please the prospect (printer) to win the deal that we end up with loads of features for the printers and not enough focus on the needs of the customers (front end).

How much value do those print-centric features have when the customer fails to adopt the order entry solution? Almost none.

Automation starts at your customer's desktop; they want to order in a self-service fashion. The primary function of a Web2Print solution is to drive customer adoption of the tool, not to reinvent pre-press or cost calculations on the production floor. Keep the focus on what's important!

The overlap challenge gets more complicated when you haven't designated one system to hold the master data. What

is the system of record or master data holder for critical data points like pricing and order management? The master data holder in the business process of print is the Print MIS because that's where ALL orders need to end up, no matter what the process for order entry (i.e., web, phone, fax, sales rep). All other solutions should “subscribe” to the Print MIS. Ideally, you want to manage unique data in one place. It makes sense to put pricing in the Print MIS with the Web2Print solution pulling from it; that way pricing is always consistent and if you need to change pricing, you make the change in one place. This kind of deep integration is hard to do, especially when the solutions are from different vendors.

In a truly integrated workflow, jobs would “flow” from order entry into the production workflow (without rekeying) and simultaneously create the job in the Print MIS solution (without rekeying). Resources, both labor and materials, would be tracked via direct connections to the controllers (RIP) to the Print MIS or bar code scanning at various stations on the production floor.

Data “flows” from order entry to invoice, eliminating manual tasks, error-prone rekeying, and limiting the number of manual touches to actual physical tasks, such as moving printed products and bindery.





## Chapter 9: Sales

Some people are saying, “You can’t sell print anymore, you have to sell solutions.” Others are saying, “You can’t be just a printer anymore; you have to be a marketing services provider.” What does this mean?

### Solution Selling

Here’s one definition of a solution - a potential answer to a customer’s challenge or problem. This leads right into the next term to define – “problem/challenge.” In order for you to effectively sell solutions, guess what you have to do? You have to understand your customer and what problem your customer is trying to solve. Diagnose before you prescribe. Do you see how this leads you away from pixels, resolution, paper stocks and into the realm of communication for various purposes: promotion, compliance, and education? What problems are your customer’s experiencing that print and print-related communication services might solve?

Solution selling is about understanding what your customers or prospects are trying to accomplish. A solution sale is more about asking questions and listening with a lot LESS talking about you, your business, or the printing process.

What about technology and the solution sale? Today time is everyone's most precious resource. It's no longer enough to provide an excellent product, at a competitive price, with great service – you have to do all that AND make it brilliantly easy for the customer to interact with your business. Do you provide an excellent product, at a competitive price, but your lack of an online procurement system makes it impossible for your customers to see their spending history without multiple interactions with your accounting department?

Technology enables you to add value around your core product. It's about the core values of e-commerce:

1. Self-service and On Demand
2. Structured approach to procurement (budget control, spending limits, cost center tracking, and integration to eProcurement systems)
3. Access to Transactional Data (transactional history and reports)

None of these things have ANYTHING to do with print. It's not about print – it's about easing procurement.

Solution selling is about looking beyond your core product and your perspective. It's about putting yourself in the shoes of your customers and figuring out solutions by digging into THEIR problems. You have the knowledge of what can be done with print and print-related communications. You need to put

forth the effort to learn their business in order to be in a position to extend your service offering to solve their problems.

## **Web2Print and Your Sales Team**

If you've implemented a Web2Print solution without involving your sales team, backup and make the introduction as soon as possible.

Selling print today is almost ALL about the procurement process and very little about the manufacturing process. Your online strategy is a key part of your value proposition.

Yes, your customers only care about their experience and their experience is 100% on your front end. What happens between order entry and invoice isn't of concern to them as long as they get their job with acceptable quality, competitively priced, and delivered on time.

Your sales people have always represented the needs and perspective of the customer – online order entry is no exception. If your sales people can't figure your solution out, chances are your customers aren't going to be able to either. A sales representative at a printer should be able to get through a basic demonstration of your ordering system. Yes, they might have to make a lifeline call for technical questions, but the more confident they are in the system the more believable the technology is to the customer/prospect.

A Web2Print system that is selected and deployed by production resources tends to overlook the true audience (the customer) and to create an experience that is heavily weighted down in print manufacturing terminology and too many steps that benefit production but ignore **the most important resource in the value chain – the customer’s time.**

Arrange a marriage between your order entry system and your sales team. They will win more deals and drive adoption of the tool with existing customers if you sell them on it first.

## Avoid Sales Chaos

What’s the worst statement a sales representative can make during a technology sales demonstration?

“We can change virtually anything; we can make this look exactly how you want it!”

Thank you “Sales Dude” you just unknowingly did the following:

- **Focused the prospect on what they want to change in the solution vs. what they like about the system.** From that comment forward, the prospect will be inclined to look and keep track of everything they think should be different with the solution.
- **Created an expectation you’re implementation team can never meet.** Even if your solution is highly configurable, it doesn’t mean you should waste the time or money

configuring everything! Implementation should be about achieving ROI as efficiently as possible; pushing pixels around the page rarely gets you any closer to ROI.

Before we beat up sales too much, let's talk about who is really to blame when sales resources "sell without boundaries." Good sales people are (or should be) by their very nature thinking beyond limits because it's their job to create new business. Left to their own devices, sales will sell without limits. So if no limits have been set, sales are just doing what sales does.

The problem really occurs upstream from sales, where "productization" should have occurred. You can call this a marketing function, but every business has to do it whether they have someone with a marketing title or not.

#### AGREED MEANING

**Productization: when you define the value you're providing to the customer and what problems you solve through that value delivery.**

Let's take an example from the world of Web2Print. The printer's prospect expresses the challenge of managing collateral across a large network of distributors. The print sales representative steps in and suggests a Web2Print platform to manage the collateral distribution. During the

software demonstration, the client asks, “Can this website be designed to look just like my intranet?”

FULL STOP.

Choose your words carefully.

You’re on a sales call, and you’re dying to say, “Yes” to everything without hesitation, right? Sometimes questions are better answered not with answers, but with clarifying questions. Do you know why the client would want the site to look just like their intranet site? Of course, we can all make an assumption, but it’s usually more interesting to actually get the answer to the direct question.

“What would your objectives be to making the site look just like you’re intranet site?” The client then says, “I want the distributors to feel like this is part of our overall offering by seamlessly inserting it where other products and services are offered.” Juicy fact #1: You just found out they provide other products and services via their intranet site to their distributors. Next question, “What other products and services do your distributors procure from your intranet site?”

More listening, more questions, more knowledge about the customer and NO lame commitments to functionality that isn’t that important in the grand scheme of things. I’m not trying to teach you how to avoid answering questions. The

answer would be, “We can accommodate your requirement to make the user experience familiar to your distributors.”

Did you promise that everything could be customized? No.  
Did you say it could look EXACTLY like their intranet site? No.  
Did you find out some more information about how they support their distributor network? Yes.

How do you appear in the eyes of the prospect? You appear to be someone who is genuinely curious about how their business works today, and most importantly, you seem to be listening because you’re asking intelligent follow-up questions rather than rattling off features.

## **How do you aim or target your sales team?**

### **1. Take the Time to Productize Your Offering**

Each time you add value to your offering, take the time to define the value to your sales team. Brainstorm about how to best present this new value to prospective customers. Don’t assume everyone is on the same page. Proactively take actions to assure everyone from sales to accounting understands the new product offering.

### **2. Keep them Focused on Overall Objectives, Not the Weeds**

The natural tendency for both sales and prospects is to dive into the features (aka “the weeds”). A good sales person keeps the conversation on what matters most – understanding the core objectives of the customer and

then showing how the solution meets those core objectives.

### **3. Build Trust in what Your Solution Does Well**

Sales people who are “insecure” about the solution they are selling tend to exaggerate and give the “yes it can” answer to everything. One of the best ways to build trust in your sales team is to explain how existing customers are using the solution. Focus on the customers who are utilizing what the solution does best. You want to sell to customers who have the challenges that your solution solves out of the box. This applies to any sale. Once you go down the path of trying to make your product/service do something it was never intended to do, you might make it through the sales process, but everything else after that will be an exercise in frustration.

### **4. Provide Sample Answers/Explanations**

A customer asks, “Can you customize the look and feel of the site?” This is a very common question. Instead of the default, “Yes, we can do anything you want,” give the sales representative an alternative like this: the site is built around a framework, which allows for controlled configuration within that framework. This approach allows us to offer customization while preventing you from doing anything that would break the solution. You sound smarter; your company sounds smarter because why would you



allow people to make changes that might break the solution?

We like to divide things up into silos. Sales are over here; operations are over here; and management is over here. The whole thing is a process, and everything starts with sales. When sales presents and sells what you have, the whole process is easy. When sales presents and sells what they imagine you should have, the whole process is no fun. Connect the silos of your business through productization each and every time you add value to your offering.

## **Features Tell, Benefits Sell**

I had the pleasure of attending a Guerilla Marketing Workshop presented by Al Lautenslager, co-author of *Guerrilla Marketing in 30 Days* (2005, Entrepreneur Press). The gem that has stuck with me from Al's presentation was "Features Tell, Benefits Sell." It's one of those phrases that pack a lot of meaning behind it. The customer wants you to understand them FIRST and THEN apply your expertise to their challenges.

Are you spending your precious sales resources telling your prospects about you OR are you listening for their challenges so you can SELL them on relevant benefits?

PowerPoint encourages the wrong behavior in a sales cycle. I'm not sure there is a real need for the "sales presentation" because the typical presentation format assumes one-way

communication (i.e., you presenting to them). When I say “typical presentation,” I’m talking about the standard mind-numbing format of Title + 4-5 bullet points that you read aloud with the predictable outcome of insulting everyone’s intelligence in the audience.

This encourages “telling” and the feature dump. The challenge with ditching the presentation is that you have to be comfortable engaging in a live and interactive discussion with the prospect. This means there is no script, and you actually have to both know your stuff AND be able to learn about the customer during the meeting.

Take a look at your sales process:  
are you “telling” or “selling”?



## Chapter 10: Conclusions

Web2Print is the connection between you and your customers. Technology should improve this relationship, not interfere with it. Moving online at this point isn't about exploring new frontiers; it's about following your customers.

We can't let our nostalgia for prints past hold us back. Change is necessary.

*Web2Print isn't a side project, it isn't a "nice to have," it is the **PRIMARY** way you'll be engaging and interacting with customers moving forward.*

As always, there are exceptions, but don't point to exceptions as an excuse to not move forward.

Doing business online is different, and it requires you to take a different approach. You may be frustrated with this reality, no matter what stage of your career. Yes, you have to face yet another steep learning curve.

The digital economy, as discussed at the beginning of this book, has changed the underlying game for the information business forever. Your first move is to get your atoms-based business up on the digital infrastructure, the web. Your second

move is to start offering pure digital products and services in the information business. This is what it means to be truly diversified.

What's the positive side of all this change? Everybody is forced to change and learn - you can't rely on legacy expertise.

What stays the same? This rapid change and new technology does not change the underlying core business concepts: provide a valuable product, at a competitive price, with excellent service.

*Keep business in the driver's seat when you're engaged in a technology discussion, and never let technology drive. Like a highlighted route on a map, remember that technology just helps you with a better way to get where you need to go. And while routes change, the destination is always your next great customer.*

## Glossary

**BUSINESS 2 CONSUMER (B2C)** A target market that focuses on transactions with individuals or direct to the consumer for their own use, a print example would be a color calendar purchased from a photo site. B2C addresses a market of people you **don't know**; because of this B2C solutions need to support anonymous shopping, credit cards, tax calculations, self registration, etc.

**BUSINESS 2 BUSINESS (B2B)** A target market that inherently means you're doing business with people you know. You have established a relationship with these customers and now you are servicing that relationship.

**DIGITAL ECONOMY** An economy based on processing bits (non-physical products and services) using digital technologies. Synonyms: Internet Economy, Web Economy.

**LICENSED SOFTWARE** a legal instrument that grants the purchaser the right to use the software, the business model is typically an upfront license fee with an annual maintenance.

**PRINT PRODUCT WORKFLOW** A name for the different workflows required to support the multitude of print products and services. Product Workflows start after the shopper has found the product and stops once the product is placed in the shopping cart. The product workflows include everything in between.

**SOFTWARE AS A SERVICE (SAAS)** a legal instrument that grants usage of software over a specified time (i.e. monthly). The business model is typically a monthly subscription.

**WEB2PRINT:** The online connector between printers and their customers. A set of software tools which facilitate order entry via the web, Synonyms: web to print, web-to-print, print e-commerce.

# Index

## A

Al Lautenslager ..... 129  
 Amazon ..... 10, 11  
 API ..... 114  
 Apple ..... 37, 113  
 ATM ..... 23, 48  
 Atoms-based economies ..... 9  
 Automation ..... 115, 116, 119

## B

B2B ..... 46, 47, 48, 54, 72, 93, 100, 133  
 B2C ..... 47, 48, 54, 72, 100, 133  
 Browser ..... 26, 54, 61  
 Business Results ..... 77

## C

Change Management ..... 69  
 Channel Partner ..... 83, 103  
 Chris Anderson ..... 9, 12  
 Cloud computing ..... 14  
 Coach ..... 78  
 Configuration Paralysis ..... 97

## D

David Allen ..... 92  
 Digital Economy . 4, 7, 8, 9, 10, 12, 14, 15,  
 18, 47, 78, 82, 131

## E

**Ease of Use** ..... 67  
 Encyclopedia Britannica ..... 21, 35  
 Eric Ries ..... 39

## F

Facebook ..... 24, 39  
 Fear ..... 69, 70, 76, 82, 92  
 Feature. 36, 55, 68, 88, 99, 100, 104, 108,  
 109, 111, 118, 130  
 Freemium ..... 16, 17

## G

Google ..... 10, 15, 16, 30, 69, 102

## H

Henry Ford ..... 28

## I

Implementation ..... 80, 85, 86, 89, 90, 124  
 InfoTrends ..... 23  
 In-Plant ..... 72, 103  
 Integration ..... 111, 113, 114  
 iTunes ..... 11, 12, 113

## J

Josh Kopelman ..... 18

## K

Kindle ..... 10  
 Kinko's ..... 26

## L

Labor .. 25, 26, 28, 33, 34, 49, 87, 95, 103,  
 112, 116, 117, 120  
 leader ..... 18, 38, 82, 95

## M

Marketing Service Providers ..... 9, 66  
 Microsoft ..... 18, 105  
 Mimeo ..... 50  
 Minimum Viable Product ..... 92  
 Moore's Law ..... 12

## N

Netflix ..... 21  
 Nicholas Negroponte ..... 8

## O

ONLINE STRATEGY ..... 41, 95

## P

PDF ..... 24, 52, 115  
**Photo Products** ..... 56  
 Pilot ..... 89  
 PowerPoint ..... 129  
 Print MIS .. 64, 65, 92, 111, 113, 116, 118,  
 120  
 Product Manager ..... 64, 102, 109  
 Product workflows ..... 51  
 Productization ..... 125  
**Promo** ..... 55  
**R**  
 RIP ..... 116, 120

ROI .. 36, 44, 60, 62, 90, 98, 106, 110, 125

**S**

SaaS..... 14, 18, 61, 62, *See* Software as a Service

Sales ..... 28, 29, 65, 81, 86, 105, 121, 123, 124, 128, 129

Sales Cycle..... 28, 29

Self-Service..... 23, 25, 34

SEO..... 72

Seth Godin ..... 92

Simplicity..... 67, 68, 99

Software as a Service ..... 13

SaaS..... 14

Solution Selling..... 121, 122

Steve Jobs ..... 28, 37

Strategy 30, 35, 36, 37, 38, 42, 43, 46, 48, 49, 50, 52, 63, 67, 69, 71, 72, 73, 76, 80, 81, 84, 85, 94, 95, 96, 102, 104, 105, 107, 123

**T**

Target Market ..... 42, 46

Technical Sales Specialist..... 65, 66

Technology ... 2, 24, 25, 26, 28, 31, 34, 36, 51, 52, 58, 59, 60, 63, 64, 65, 67, 68, 69, 71, 72, 73, 75, 76, 77, 78, 80, 81, 82, 85, 86, 89, 94, 95, 99, 100, 101, 102, 103, 105, 107, 108, 111, 116, 122, 123, 124, 132, 137

The Long Tail ..... 12

**U**

Usability ..... 74, 100

**V**

VDP ..... 54, 72

VistaPrint..... 47, 49, 69

**W**

Web 2.0..... 16, 17

Wild Success..... 86

**Y**

Yahoo! ..... 37

Yelp ..... 31



## About the Author



Jennifer Matt works at the intersection of the new online dominated world and the traditional manufacturing workflows of print.

With direct experience in virtually all aspects of the business process (sales through software development); Jennifer brings a unique perspective to the challenges of converting traditional offline print businesses to successful online print businesses.

After leadership positions at several major Web2Print technology companies and direct involvement in many of the largest Web2Print projects in the US and Europe, Jennifer Matt founded Web2Print Experts, Inc. and is the current managing editor of The Web and Print blog on [WhatTheyThink.com](http://WhatTheyThink.com)

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