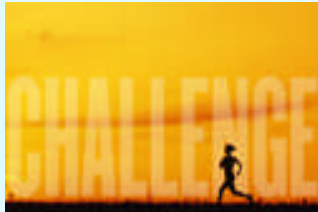




CAVENDISH

Development of Print Synergies



To develop a group of companies offering niche (specialist) Print manufacturers and a Print Management Service Programme.

What are Niche (Specialist) Print Manufacturers and Print Management?

To bring together niche (specialist) manufacturing companies of Printed items with a Print Management Service company as a group to offer the economies of scale as a one stop solution to customers needs.

The Business Forms Management Association (BFMA) defined Print Management as `the systematic process of increasing productivity and minimising errors in information capture, transmission and recovery through the use of work flow analysis and graphic design techniques; providing administration control; reducing procurement, storage, distribution and use costs through standardisation; and ensuring the adequacy, business as well as legal, of all historical records`.

Even with a definition as long as that, explaining Print Management is never easy. This is especially true when the term `Documents Management`, `Forms Management` and `Print Management` are constantly used and abused. The concept has often been a way for vendors to sell more printing.

Some vendors provide warehousing, distribution and inventory reports, and call this either Documents/Forms/Print Management. But there is not a provision in this method for Documents/Forms analysis, improved design and many of the Documents/Forms functions.

Other vendors provide design services and some control functions but no warehousing and distribution. Without a close watch on inventories, it is difficult to plan combination orders or reduce the incidence of rush/emergency orders due to depleted stocks.

Still, other vendors provide all these services but they are interested in only high volume Documents/Forms. If, the vendor representative is not as concerned about the documents/forms that use 1000 copies a year as he/she is about the high volume documents/forms, the enormous clerical expense associated with documents/forms is not addressed. This is not a Print Management Service.

Briefly stated, Documents/Forms/Print Management is involved with the elimination of paperwork and an improvement in clerical efficiency, both leading to a reduction in companies expenses. If you think documents/forms/print costs are insignificant, think again.

Managing the documents/forms of business, including business documents/forms, is one method of affecting the companies `bottom-line`. One of the best ways to `focus on the process of creating the document/form and conveying` it, is through an effective Documents/Forms/Print Management Programme. How then does one implement Documents/Forms/Print Management? What are the components of a Documents/Forms/Print Management Programme?

For the purpose of this publication we will call the system, `Print Management` as the generic name. This name is used by most of the specialists who offer a Documents/Forms/Print Management Programme.

This publication will provide some of the basic answers to these questions. In the first part I will address document/form analysis and document/form design; and in the second part I will address document/form control, and warehousing/distribution. Please note a good ` Print Management Programme ` must include all these components.

Document/Form Analysis and Design

I will define the difference between document/form analysis and document/form design. Document/form analysis is ` the systematic execution of those steps necessary to ensure that productivity is increased in preparation, use, buying and retrieval; the total number of documents/forms within the system is minimised; data element relationships are apparent through consistency and adherence to standards; the effectiveness of the entire system as well as the individual document/form is enhanced; and the resulting business tool communicates `.

Document/form design is termed as `design analysis` and that in addition to resulting in the design layout, (it) increases productivity by creating a basic business tool which is self instructive, encourages co-operation response, provides for easy entry of data, reduces the potential for error, facilitates the use of the information, and enhances the organisations image.

Document/Form Analysis vs Document/Form Design

Document/Form analysis resolves what goes on the document/form, while document/form design continues the analysis until it resolves how to best arrange and present the information.

Or another way to look at it, document/form analysis determines who, what, when, where, why and how the document/form is used. Document/Form design, on the other hand, decides how the document/form looks and how it is constructed.

Good work in analysis and design can speed a document/form programme to its goal of eliminating paperwork and improving clerical efficiency, both leading to a reduction in companies expenses.

As a basic tool of clerical operations, thoroughly analysed and well designed documents/forms provide many benefits. They look good, and better-looking documents/forms have more appeal. Well-analysed and designed documents/forms provide for easy entry of data and allow for easier use of the data. They reduce the chance of error when entering or retrieving information. They are self-instructing.



It is a good idea to have a `document/form initiation request` to force (persuade) the sponsor to give the document/form and its use some thought. The document/form initiation request gives basic information about the document/form, who initiated it, who authorised it, when it will be used. The request document/form gives the document/form analyst a place to start the analysis and to ask the old journalism questions of who, what, when and where.

What is the purpose of the document/form? Question and need of the document/form should always be the first step in document/form analysis. Dr. Ben Graham, an international expert in productivity analysis, relates a key anecdote to illustrate this point. While he was working in Venezuela with a manufacturing company which wanted to streamline its entire operation? After careful analysis of all documents/forms as they related to the workflow, one document/form remained unidentified. Although it was duly completed, routed and filed and it had been for many years, no one really knew why it was being used. It just always had. After much research, it was determined that the document/form had been used during World War Two so that the manufactured goods could be loaded on a ship that was to join a convoy crossing the Atlantic. Remember this was 1973 and the usefulness of this document/form had ceased. Moral of the story always determines the purpose first to see if the document/form is even needed.

Who initiates the document/form? Is it one person or one department within the company or many persons/departments? Is it always the same person? Does it stay in the originating department? Perhaps many people within the company who may not have detailed instructions or policy manuals initiate it. Is it a public use document/form such as a credit card application, hospital admission, or utility application?

Who receives the document/form? All the same questions apply for the receivers as the initiators. Does the document/form go outside the company? or if so, are there logo type and graphic standards that must be considered?

When is the document/form completed? Daily, weekly, monthly, annually?

Where is the document/form used? Is it a clean, well-lighted office? Or perhaps a manufacturing environment full of oils or chemicals? Maybe it is a shipping or receiving area, which is poorly lighted and dusty.

Where is the document/form stored? Is it in an office or in a non air-conditioned warehouse?

How have the most questions of all. How does the document/form work with other documents/forms? Is their information copied from or to it? Is information from this document/form keyed into a computer system? Is the information sequence correct and are the captions the same? Does it work with bar codes or MICR? How is the document/form completed, by hand or by machine, such as a typewriter, word processor, or computer? How is the document/form distributed? In what sequence are the copies removed? Are the copies legible, are the copies separated manually or is the process mechanised? Do people make copies? Do recipients use their copies? How is the document/form filed? Does it go into a binder or folder? If it needs hole punching. What size and how many holes? Is the document/form the right size for the file? What is the filing reference-serial number? company name, customer name?

There are many checklists in the literature from the Print Management specialist to help with questions such as these.

To restate them, document/form analysis determines how the document/form is used and all its ramifications. Once this is done and the document/form sponsor supplies the document/form content, the next step is document/form design.

Document/Form Design

Document/Form design makes use of all information gathered about the document/form to arrange the data fields and construct the document/form for best use. First, there are technical components based on international standards or proven research. These are such issues as paper sizes, paperweights, colour, legibility, type sizes and measurements.

Second, there are convention and proven practices such as data sequence going from top to bottom, and left to right, typeface selection and design consistency among documents/forms.

Third is corporate identity, applying the logotype correctly and using designated type styles.

Fourth is the creation design component, there is not just one way to design a document/form. Just because two document/form designs are different, it does not mean that one is better than the other is.

Although a requesting department is depending on Print Management design and analysis, it must be remembered that only the document/form sponsor can know whether or not a document/form is needed. Only the sponsor knows when a document/form should be kept in use, only the sponsor knows what information is required on the document/form. The role of Print Management is to ensure that good analysis and design skills have been used during the document/form creation and that it conforms to corporate standards.

Remember document/form analysis and designs are integral parts of a comprehensive Print Management programme. Document/form automation via electronic document/form requires even more thorough analysis prior to design. In addition to all the considerations addressed in this publication concerning conventional documents/forms, a host of other issues come into play when designing an electronic document/form. Just a few of these issues are determining interaction with databases, structure for intelligent or conditional movement through the document/form, and electronic booting. Detailed discussions of these topics however go beyond the scope of this publication.

Document/Form Control Considerations

In addition to document/form analysis and design, Print Management requires that certain document/form control functions be provided. These are document/ form identification, indexes and files, document/form tests, obsolescence studies and management reports.

Document/Form Identification

There are two primary ways to identify a document/form, by its title or by its document/form number. There are many different ways to assign document/form numbers, but keep these issues in mind, a document/form number is just an identifier-not a code. The way the Print Management programme works on identification is a master control number in sequential order followed by a family number which is the department, by a function number which is the numbered document/form being used in that department and the date the document/form was initiated for use.

After the document/form has been in use, of course, if the document/form is revised for any reason, it must be given a revision date so that the records accordingly can be updated on the revision of any document/form by a revised indicator of date. This must be entered on all data appertaining to this particular document/form.

Document/Form numbers and titles are the two most useful ways of identifying a document/form. Generally the number is most useful to the people who control the Print Management programme, while the title is most useful to the document/form users. All documents/forms have titles. A document/form title should be brief but descriptive. It should include a subject such as `cash` or `delivery` or `employer` and an action or function such as `to report` or `to notify` or `to agree`. It is not necessary to use words such as `for` or `card` in the document/form title.

It is also best to place the subject first and the action second. For example, `Employment Application` instead of `Application for Employment`. An alphabetical catalogue will list the subject first and avoid many `requests for`, `notice of`, `application form`, and `listings`.

Indexes and Files

Once a document/form has a number and a title, it can be entered into a database or word processor system with sorting capability. Creating an index by document/form number, alphabetically by title, and alphabetically by sponsoring department. Remember that users often use a document/form title of function, but not the document/form number. Having an index by title or department can be a lifesaver.

There are three types of files for document/form control-the master control, the family control and functional control. The master control file contains everything you need to know about a document/form history, such as the document/form initiation request, proof approvals, specifications and copy of each for revision, production notes and comments, artwork and so forth. Artwork may be filed separately or there may be nothing in the master file but the artwork and current samples and the original request document/form. The other types of files used in the document/form control are the family and function files.

Briefly, the goal of the family and functional file is to improve productivity by reducing clerical effort. The family file is an indicator for the department that the document/form is being used and the functional file reveals and brings together all documents/forms doing the same operation within each department. One sample of each document/form is filed by the function it serves, not by the department name or subsidiary name. Print Management specialists always file by master, family and functional records.

The functional file is beneficial because you can spot document/form duplications, overlapping documents/forms and good candidates for document/form consolidations.

This is an extremely useful file, but one that know-how to start and considerable time to maintain. Very few companies have functional files and to conduct Print Management right, a functional file is highly recommended.

Document/Form Tests

Another document/form control function is testing the proposed document/form to see if it works in the real environment. Based on the test results, the design, the layout, wording and so forth can be modified and then re-tested. Document/form testing is especially needed when diverse groups within a company, documents/forms such as cheque requests, purchase, use the document/form requisitions, expense statements.

Testing is a must if a document/form is received by (and if it must be interpreted by) the general public. Two good examples are tax documents/forms and telephone bills. Testing is also necessary if the document/form is completed by the public-for example applications for social security or employment.

Obsolescence Studies

Another document/form control function is the obsolescence study. Departments rarely notify the Print Management group when a document/form is no longer in use. It is up to the Print Management staff to initiate an obsolescence study.

Why find out if a document/form is obsolete? In part, cutting out obsolete documents/forms helps cut down the Print Management teams record keeping and file space. Warehousing costs can be reduced by decreasing the number of documents/forms stored and the amount of space used. Finally, if the total number of documents/forms never shows a decrease, management will question what is being done to manage the documents/forms and to keep them under control.

How does one perform an obsolescence study? That depends on several factors. How easy is it to review the order history` manual or automated`? That depends on several factors. How much clerical support is available to pull samples, check the order history, and check on replacement sponsors? Are filing and warehousing space at a premium?

After the sponsor has returned the enquiries, there is still much work to do. If the document/form is active, find out why it has not been ordered for so long. Are the users photocopying the document/form or have they arranged for printing on their own?

If the document/form is cancelled, what is replacing it? If the replacement document/form does not have a document/form number, there is more follow up work to do. When a document/form is cancelled, it must be removed from active to cancelled status and all records purged. For instance, the document/form index, from history file, from artwork file, etc all must be closed down. The artwork and history files are moved to an inactive file or records storage area.

Under no circumstances should ordering of paper etc be ordered by any department, it must all be ordered through the Print Management team for full control.

The results on all obsolescence studies should be reported to management. Include the number of enquiries sent the responses received the cancellations processed and the square footage free in the warehouse. Other interesting findings should be reported as well.

Management Reports



A Print Management programme whether in-house or vendor supplied must justify its existence all the time. Management wants pertinent statistics, the number of new, revised, cancelled and reprinted documents/forms as well as total number of documents/forms. To continue justifying being part of the team information on document/form improvement should also be provided.

Document/Form improvement boils down to three goals, fewer documents/forms, better documents/forms and more economical documents/forms. Show management these three issues every time you file a Print Management report.

To achieve fewer documents/forms, you must eliminate unused documents/forms, consolidate existing documents/forms, and merge new document/form requests with existing documents/forms, file existing documents/forms to serve new requests without modification.

Better documents/forms means creating more clerically efficient documents/forms-enabling increased worker productivity and reducing human error. Remember, documents/forms are designed differently for completion by hand, machine or by computer. For instance, take into account the need for correct spacing, the carriage returns, and hand entry; make sure strike out boxes are aligned properly, ensure that there is design consistency, and take care to see that file holes are pre-punched so that employees do not have to punch each document/form as it is used. Think ahead and save clerical money!

Most economical documents/forms means they are designed to reduce printing costs as well as storage and distribution costs. To keep costs low, make sure to use standard paper sizes, standard paper colour sequences, and standard ink colours. Do not get caught in the trap of making recommendations to save manufacturing pounds, the clerical processing time will be increased. This is a false saving. Remember that the clerical cost of processing a document/form has been calculated to cost at 20 times the cost of printing a document/form.

An easy way to report documents/forms improvements to management is to provide a simple list of the document/form numbers and a brief description of the improvements by category `consolidation`, improved clerical efficiency, reduces manufacturing costs`.

Include in the value example hard pound savings of each of these improvements as well.

The statistical and description reporting should be done on a monthly basis. But there are many other opportunities, such as special projects or displays to let management know what the Print Management programme has done for the organisation recently.

Warehousing and Distribution Considerations.

There are several options for the Print Management team to determine how to keep the company supplied with documents/forms. One option is to use electronic documents/forms and have no-printed documents/forms. Currently, this is not a viable option for most companies. Another choice is to print documents/forms on demand. This works well for low volume cut sheets or pre-collated carbonless sets. However, it is not cost effective for speciality items such as custom continuous documents/forms, unit sets with special features, tags, labels or special envelopes. As a result, most companies require some sort of storage for the documents/forms which are used in large volumes or which are printed in advance using specialised equipment.

Companies can obtain warehousing and distribution fairly easily. A manual in-house operated stock room or automated warehouses are possible choices. Most Print Management companies manage the total flow of documents/forms, where by you do not need the cost of warehousing and distribution.

Well managed warehousing and distribution is important to the Print Management programme. Why? Because knowing when stocks are reaching their depletion point allows time to review the situation. For instance, documents/forms can be reviewed prior to reprinting; and the review can be used for additional analysis-and possibly the analysis will lead to additional document/form considerations.

Adequate lead times also eliminate rush/emergency printing charges-allowing you, the Print Management team, to get the right item to the right people, at the right time and at the lowest cost.

There are other issues, however, the important issue is the warehousing and distribution component of a successful Print Management programme. The most critical issues are correct unit of issue; backs orders and correct data entry.

Correct Data Entry

The maximum `garbage in, garbage out` (meaning, you will get inaccurate statistics and reports-output-if your input data is incorrect) was never truer than in this instance. Accurate reorder reports, accurate usage figures and accurate order histories are totally dependent on quality control of data input. All of these reports affect the ability of the Print Management programme to ensure that documents/forms are available when needed and that documents/forms pricing is not subject to emergency charges.

Of course, no data entry is ever going to be 100% accurate, cross verification from other sources can be useful and a physical inventory should be carried out at least once every six months to double check the report inventories.

What other issues do Print Management needs to address?

There are a number of reports from the warehouse that are useful to the team-quantity on hand, reorder notices, monthly order history and end usage information.

The quantity on hand report details the current inventory of each document/form. It can also include such items as unit of issue, value of each item and last reorder date and quantity. The value of each document/form details how much the inventory is worth. This is useful for budgeting and insurance purposes.

Recorder Reports

Reorder reports enables the Print Management team to know which documents/forms are at a depletion point. The documents/forms on the reorder report can be cross-referenced to a document/form list sorted by size to help determine combination orders.

The monthly order history gives trend information. It helps with documents/forms that are used seasonally. It is also useful when trying to predict accurately when a document/form must be reordered.

Conclusion



The development of niche (specialist) Print Manufacturers and a Print Management Service Programme save customers an enormous amount of money!

Printed Documents/Forms are a part of every companies business. Print Management (niche manufacturing together with a Print Management Service Programme) should be an essential part of every companies business as the third dimension of control for your company.



Colin Thompson is the author of this paper and the publication `The Guide to Print/Forms Management Service`, plus many more publications, research reports and educational CD's. Also, a former successful Managing Director of Print Manufacturers, Print Management/Workflow Solutions companies. Please visit www.cavendish-mr.org.uk for powerful publications and testimonials.

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About the Author Colin Thompson

Colin is a former successful Managing Director of Transactional/Print Manufacturing Plants, Print Management/Workflow Solutions companies and other organisations, former Group Chairman of the Academy for Chief Executives and Non-Executive Director, helping companies raise their **`bottom-line`** and **`increase cash flow`**. Plus, helping individuals to be successful in business and life in general. Author of several publications, research reports, guides, business and educational models on CD-ROM/Software/PDF and over 400 articles published on business and educational subjects worldwide. Plus, International Speaker and Visiting University Professor.

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