

CRM:  
THE ONE RING THAT RULES THEM ALL.





# LANE PRESS

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*On Your Page™*





# THE BACKSTORY

- 115 years old
- \$45 million revenue
- Magazines: 100%
- Heatset web
- 300 publishers / 445 titles.
- Circulations 25K to 400K
- Four vertical segments
- 180 employees
- EFI Monarch: October 2014



# EFI MONARCH

- Monarch Foundation
- Planner
- Contract Admin
- Prinergy
- Print Flow
- Autocount
- Business Intelligence
- Digital Storefront
- Plant Manager
- Process Shipper
- Finished Goods Inventory



# THE CHALLENGE

- Obsolete CRM (ACT!)
- Used only by sales and marketing
- No estimating workflow
- No “service ticket” system.
- Garbage data with no owner.
- An island and an orphan
- Hated by every user
- Not customized or customizable.
- No available user training, internal or external.





THE PROBLEM WAS NOT THE TOOL.  
THE PROBLEM WAS THE TOOL IN USE.





THE RISK:  
DOING NO BETTER WITH A BRAND  
NEW CRM APPLICATION



# THE OPPORTUNITY: MAKE CRM THE CENTRAL APPLICATION







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# WHY PUT CRM AT THE CENTER?

- The Trigger: *Pages* the magazine







# WHY PUT CRM AT THE CENTER?

- The Meteor Principle
- The purpose of your business
- “Managing to keep the customer”



# THE METEOR PRINCIPLE





**FROM WHAT CAN YOU RECOVER?**





THE HARDEST ASSETS TO REPLACE  
ARE YOUR MOST VALUABLE ASSETS



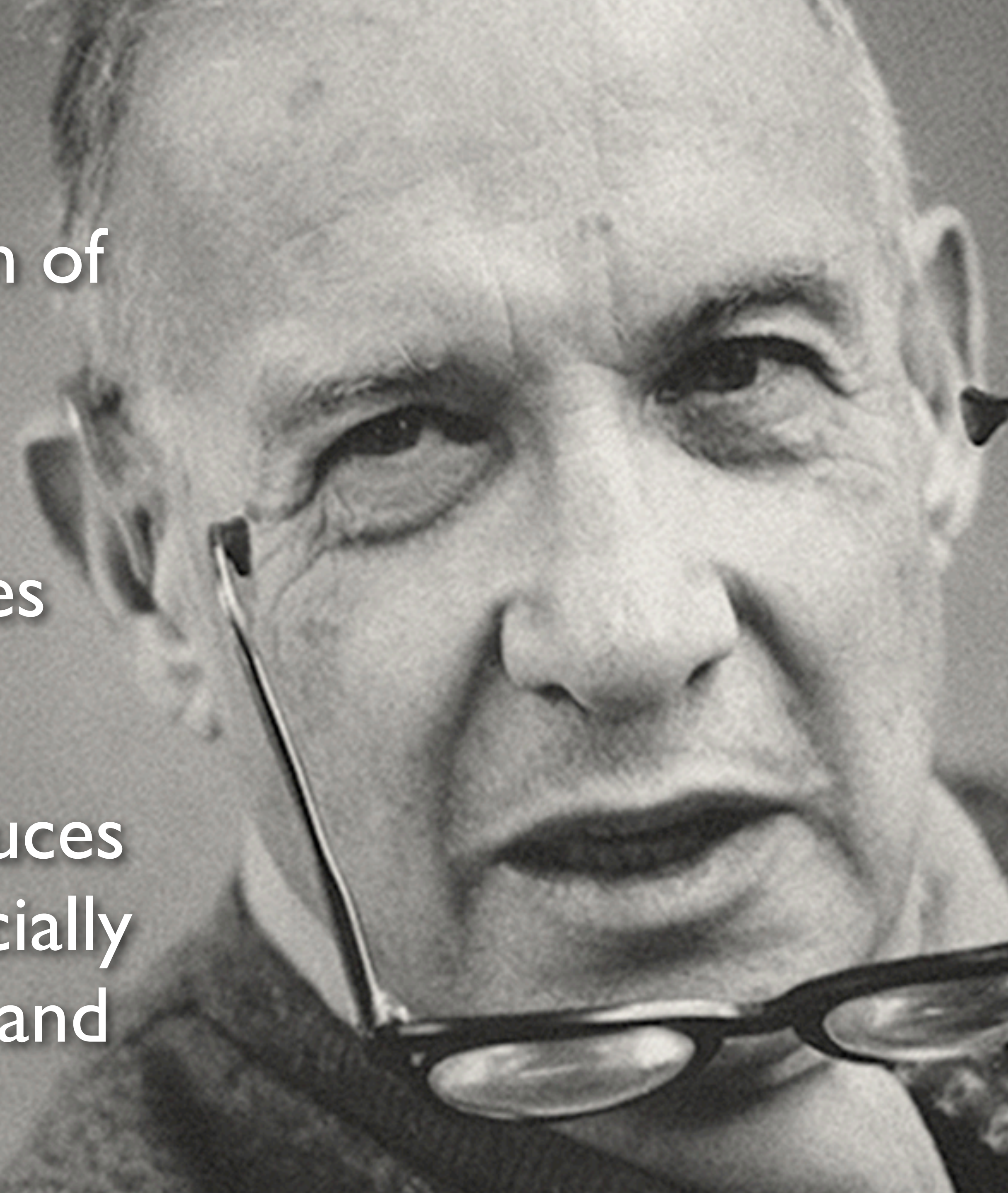


# PURPOSE

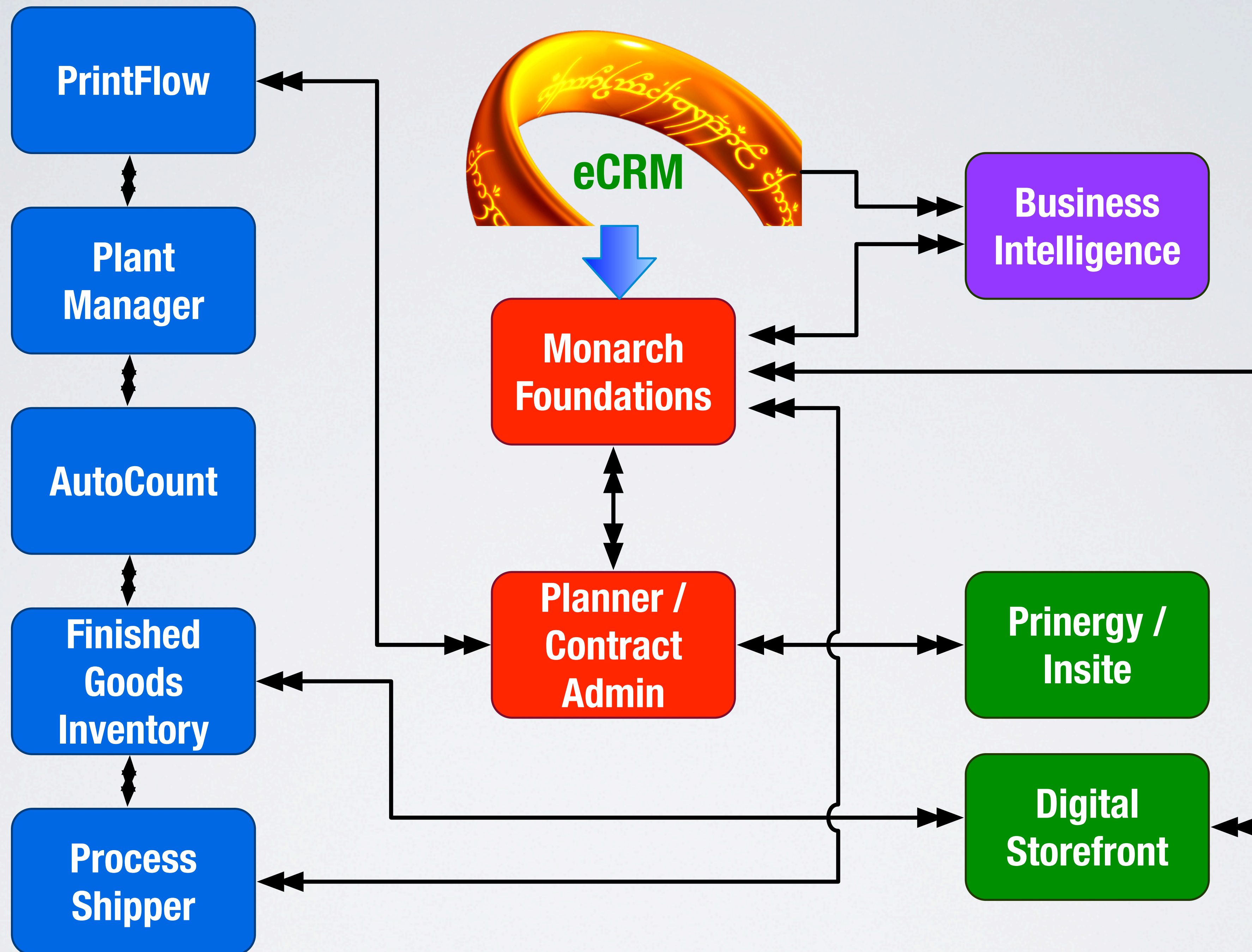
“There is only one valid definition of business purpose: to create a customer.”

It is the customer who determines what a business is.

What the business thinks it produces is not of first importance -- especially not to the future of the business and to its success.”











- Objectives & Outcomes
- Planning
- Data Integrity
- Customization
- Integration with Monarch
- Data Preparation
- User Training
- Implementation
- Use and Users
- User Discipline



# OBJECTIVES & OUTCOMES

- “Managing to keep the customer”
- Clean data beginning to end
- Company-wide users
- Company-wide visibility
- Leverage Monarch, BI & eCRM for effective reporting



# PLANNING

- “Begin with the end in mind.”
- Resources
  - People - Customization
  - People - Database Admin
  - Time - Five months
- EFI's role
- Deliverables



# DATA INTEGRITY

- One owner
- Disable bi-directional sync
- Field labeling & nomenclature.
- Naming conventions



# CUSTOMIZATION

- No custom coding.
- Worked within application limitations.
- Worked within Monarch limitations.
- Renamed and reused existing fields.
- EFl response to feature requests



# INTEGRATION WITH MONARCH

- Reining in Accounting / Admin
- Contract Admin App
- Estimating workflow



# DATA PREPARATION

- Exported and scrubbed
- Research & internal information vetting



# THE USERS

- Account Executives
- Publishers' Services Teams
  - Customer Success Managers
  - Planners
  - Prepress
  - List Services
  - Estimating / Billing
- Finance & Accounting
- Credit / Collections
- Every Manager
- Every Subject Matter Expert
- Executives



# USER TRAINING

- Developed in-house
  - Documentation & training
- Delivered in-house
- Hands on in classroom
- Three rounds:
  - CS & Managers
  - Sales
  - Everyone Else



# IMPLEMENTATION

- Training
- Publishers' Services & Marketing
- AE's
- Estimating
- Credit / collections
- Managers
- Service Recovery





# USERS AND USE

- 45 Users
  - Every department
  - All customer / publisher records including attachments.
  - Every process that touches a customer.
- Examples:
    - Credit
    - Service tickets
  - Exceptions
    - Confidential / secure customer information.



# USER DISCIPLINE

- Resist pressure to expand user rights
- Quarterly rescrub - single day.
- *Weekly Sales Activity Report* review



# RESULTS?

- Better customer experience: we all know what's going on.
- Faster issue resolution.
- Better collaboration.
- Better management information.
- Reduced “list preparation” work.
- Better contract administration.
- Easier sales management





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THANK YOU!