



## Print Distributor Strengthens Customer Ties with Flexible ERP Solution

### Overview

**Country or Region:** United States  
**Industry:** Wholesale and distribution

### Customer Profile

One of the largest print distributors in the midwestern United States, Print Management Partners handles all aspects of print and digital publishing for its clients.

### Business Situation

Print Management Partners could not easily adjust processes or e-commerce operations because the enterprise resource planning system it used was difficult to change, preventing the company from responding quickly to customer requests.

### Solution

After examining several options, Print Management Partners implemented Microsoft Dynamics NAV with help from Microsoft Gold Certified Partner Solution Systems.

### Benefits

- Nimble and robust customer service
- Easily configurable technology
- Better decisions faster
- Global expansion opportunities

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James O'Brien, President, Print Management Partners

Since its founding in 1995, Print Management Partners has made client relationships a priority. However, as the company expanded its business to manage clients' whole publishing operations, Print Management Partners found itself constrained by its old, inflexible ERP system. The company sought a new solution that would help it respond to changing customer requirements quickly. Print Management Partners chose Microsoft Dynamics NAV because of its superior technical flexibility, advantageous pricing terms for its e-commerce add-in, and the helpful approach of Microsoft Gold Certified Partner Solution Systems. With Microsoft Dynamics NAV, Print Management Partners has an agile solution that supports its unique print distribution operations. In addition, the company benefits from an integrated, real-time system that ensures accurate data to help employees make better decisions faster.



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## Situation

Already one of the largest print distributors in the midwestern United States, [Print Management Partners](#) is rapidly growing its base of satisfied customers that trust the company to manage their print and digital-publishing workflows. Print Management Partners was founded in 1995 as an employee-owned firm with an emphasis on customer service. Today, the company operates seven offices and offers a range of industry-specific services.

“Our goal is to develop long-term business relationships where our customers trust us to expertly handle the printing, distribution, and management of business communications,” explains James O'Brien, President of Print Management Partners. “We want our customers to say, ‘Print Management Partners is the easiest company to do business with.’”

Print Management Partners serves many Fortune 1000 clients who outsource their entire design, print, and distribution process to Print Management Partners and expect the print distributor to pay close attention to their unique requirements. “The ability to respond quickly to customer requests—to be able to say, ‘Yes, we can do that,’ and then have it implemented the next day—was very important to us,” says O'Brien. “However, the industry-specific ERP system that we previously used made it difficult to accommodate some of our customers' needs.”

Since its founding, Print Management Partners had used two different enterprise resource planning (ERP) systems specifically designed for the print distribution industry. However, as the company grew in scope and scale, it found that its old system was unable to handle changing business requirements, especially in terms of collaborating with customers and suppliers.

“We outgrew the capabilities of our old system,” explains O'Brien. “And, we relied on the vendor to make changes—sometimes they could make those changes, and sometimes they could not. What was worse was that sometimes the changes didn't meet our expectations, causing further delays. Because of this, it was extremely difficult to do things like change the look and feel of our e-commerce component, integrate with a customer's ERP system, or even compile data into a single report.”

## Solution

To improve its responsiveness to customer demands, Print Management Partners sought a new ERP solution that would give the company an advantage over competitors. “Ideally, your ERP system is going to help and not hinder whatever it is you're trying to accomplish,” says O'Brien. “We were looking for something that offered the right combination of functionality, flexibility, and cost-effectiveness.”

### Searching for the Right ERP Solution

Print Management Partners evaluated systems targeted at the print distribution industry, as well as those for printers, but found the same limited flexibility that plagued its previous systems. Searching for a solution with greater flexibility, Print Management Partners looked into general ERP solutions from Microsoft, NetSuite, Sage, and SAP and eventually narrowed the field down to [Microsoft Dynamics NAV](#) and SAP Business One.

“After considering our options, we chose Microsoft Dynamics NAV over competing offerings for three reasons: superior technical flexibility, the partner ecosystem, and a long-term cost advantage,” says O'Brien. Although roughly equal in terms of upfront costs, Microsoft Dynamics NAV

Print Management Partners operates several brands that serve specific industry needs.



offered lower ongoing costs due to the advantageous pricing terms in the TradePoint e-commerce add-in. Print Management Partners relies on its e-commerce channel for a significant portion of its business, and the [TradePoint e-commerce add-in](#) for Microsoft Dynamics NAV offered better pricing terms than the e-commerce solution that accompanied the competing offering.

In addition, Print Management Partners felt confident in the number and quality of Microsoft Certified Partners and independent software vendor solutions available for Microsoft Dynamics NAV. To customize and implement the solution, Print Management Partners teamed up with [Solution Systems](#), a Microsoft Gold Certified Partner and member of the 2010 President's Club for Microsoft Dynamics based just outside of Chicago. "With our previous industry-focused solution, we relied on the vendor to provide support and sometimes they couldn't accommodate our needs," says O'Brien. "So we were quite impressed by the breadth and depth of the partner ecosystem surrounding Microsoft Dynamics NAV."

#### Implementing the Solution

Print Management Partners and Solution Systems implemented Microsoft Dynamics NAV over a nine-month period, migrating data from the old systems into the new solution and configuring or enhancing it to accommodate unique business needs. Enhancements include:

- Customizable e-commerce interfaces that let account managers at Print Management Partners customize the e-commerce interface for individual users. Managers can control the appearance and information that users see when they log on to the e-commerce site.

- Customer-owned and company owned inventory handled at Print Management Partners's many storage facilities.
- Fields for tracking product features specific to the print industry. For example, envelope orders have more than 40 variables such as size, color, flap type, and window options.
- Job-costing functionality that managers use to calculate profit margins on each order.

Roughly 45 employees at seven offices use the solution as part of their daily routine and another 30 employees log on to the system occasionally.

#### Improving Processes

When deploying the new solution, O'Brien and the implementation team at Print Management Partners asked Solution Systems to replicate the functionality of their previous systems in Microsoft Dynamics NAV. "Our primary concern was to keep processes familiar for people before we started looking at opportunities for efficiency," says O'Brien.

Once the solution was in place, Print Management Partners targeted the credit rebill process for improvement. Because customer orders frequently change in terms of price and other factors even after an order is initiated, employees at Print Management Partners spend a significant amount of effort adjusting the order in the financial management system. To solve this, Print Management Partners configured Microsoft Dynamics NAV so that credit rebills trigger at a later point in the workflow.

Print Management Partners also customized screens in Microsoft Dynamics NAV to streamline how employees enter orders, adding and deleting data fields to make the process faster and more intuitive.

In a similar way, Print Management Partners changed the look and feel of its e-commerce interfaces in response to customer feedback.

Print Management Partners's new solution records data to the general ledger in real time instead of in a batch process, which was the case with the old system. Before, employees would occasionally post accounting entries late or inconsistently, requiring the accounting team to check and recheck accounts for accuracy on a daily basis. "We had built a number of checks and balances into our financial accounting process to compensate for potential errors due to batch processing in the system," explains O'Brien. "The financial controls in Microsoft Dynamics NAV are such that whatever is recorded in our general ledger is immediately reflected in our reports for sales, costs, and inventory, and vice versa."

#### **Connecting with Clients and Suppliers**

By taking advantage of the integration functionality in Microsoft Dynamics NAV, Print Management Partners collaborates with clients and suppliers by sharing real-time information about order status and tracking. "We spend a lot less time on the phone and sending faxes," explains O'Brien. "Our clients and suppliers can see information that is pertinent to their relationship with us. It's convenient for them and helps us to avoid errors due to miscommunication."

Print Management Partners also uses Microsoft Dynamics NAV to track Six Sigma process methodology at the behest of a large Fortune 100 client. "One of our largest clients invited us to become one of their suppliers that adhere to Six Sigma processes," says O'Brien. "We configured Microsoft Dynamics NAV to measure and report on our performance against that process. Now, we use the same measuring

and reporting capabilities for several other clients."

#### **Looking Ahead**

Print Management Partners is currently implementing an upgrade to Microsoft Dynamics NAV 2009 R2. "As a midsize company that chooses its projects judiciously, we are very optimistic about the possibilities with the upgrade," says O'Brien. "We like the philosophy behind the RoleTailored interfaces that make the solution easier to use. We also appreciate the enhanced flexibility that lets us respond to new requests even faster and enhanced security features that help us comply with Payment Card Industry data security standards."

#### **Benefits**

By replacing its inflexible, niche ERP system with Microsoft Dynamics NAV, Print Management Partners gained a world-class solution that helps the company deliver superior service, eliminate inefficient financial management processes, and open up opportunities for international expansion. O'Brien says the benefits of implementing Microsoft Dynamics NAV outweighed the cost. "No doubt, implementing Microsoft Dynamics NAV was a significant investment for our company, but one that has proven absolutely worth every penny," says O'Brien. "And, for us, the solution came at a long-term cost advantage over the competing product."

#### **Nimble and Robust Customer Service**

Print Management Partners uses Microsoft Dynamics NAV to respond quickly to customer requests, strengthening the company's advantage over competitors. Compared to the previous systems, employees today spend 50 percent less time processing customer orders. "Now, our ERP solution is truly an asset to the

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company that helps us nurture the types of long-term customer relationships that we strive for,” says O'Brien. “Though we're a midsize company, Microsoft Dynamics NAV empowers us to provide the world-class service that our Fortune 1000 clients expect of us.”

As an example, O'Brien cites how Print Management Partners used Microsoft Dynamics NAV to track and report on its Six Sigma performance. “By using Microsoft Dynamics NAV, we can see that our rate of accurately billed, on-time shipments meets Six Sigma standards,” says O'Brien. “That means we have less than three errors in every million transactions. Achieving those measures is great, but what's even better is when we can prove that we're doing it. These reports have definitely strengthened our relationship with those important customers.”

#### **Easily Configurable Technology**

With help from Solution Systems, Print Management Partners configured Microsoft Dynamics NAV so that it can make changes to the solution without the help of software programmers, which the company was required to do with its previous ERP system. “Solution Systems set up the solution so that our managers can easily change an e-commerce interface, for example,” says O'Brien. “We avoid relying on expensive consultants or an overextended software vendor to implement changes. Now, we get things done faster and with better results.”

#### **Better Decisions Faster**

Employees at Print Management Partners can make more informed decisions based on information from Microsoft Dynamics NAV. “The new solution enables confident decision making,” explains O'Brien. “Unlike our old system, there is very little chance that people can accidentally post an entry incorrectly. As soon as we started using

Microsoft Dynamics NAV, we saw an immediate difference. At first, we still did the checks, but we soon found that was unnecessary. And, we can easily trace back information to the transaction level if we need to verify something. Everything is integrated and available in real time throughout the company.”

O'Brien notes that Print Management Partners no longer requires daily transaction audits to verify that entries were posted correctly. That task required the equivalent of one full-time employee each year, which means that the financial accounting team at the company can now spend more time on tasks that add value.

#### **Global Expansion Opportunities**

One of Print Management Partners's largest clients recently asked the company to consider providing its services internationally. “We are looking at the possibility of expanding our business in other countries,” says O'Brien. “With the global capabilities, such as multiple options for languages, currencies, and taxes, in Microsoft Dynamics NAV, we have a comprehensive solution that can support expansion.”

## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers in the United States and Canada who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to:

[www.microsoft.com](http://www.microsoft.com)

For more information about Print Management Partners products and services, call (847) 699-2999 or visit the website at:

[www.ourpartners.com](http://www.ourpartners.com)

For more information about Solution Systems products and services, call (847) 590-3000 or visit the website at:

[www.solsyst.com](http://www.solsyst.com)

## Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to:

[www.microsoft.com/dynamics](http://www.microsoft.com/dynamics)

### Software and Services

- Microsoft Dynamics
- Microsoft Dynamics NAV

### Partners

- Solution Systems