

Copy Management Transformation

Situation

One of our major CPG clients was utilizing an antiquated, inefficient copy management process that used Microsoft Word-based documents, generated multiple versions and required that numerous copies be emailed and approved.

This poor copy management process led to an increased number of errors. Several significant errors made it to shelf, triggering corrective actions that generated large annual costs, decreased customer/consumer satisfaction, reduced organizational efficiency, and impacted their speed to market.

There were multiple, ongoing issues with copy — institutional, systemic and functional — which all needed to be addressed and solved.

Action

A three-step migration plan was developed to get to our current database solution:

Step 1: Recreate the Word-doc look and feel in the database, to deliver functionality without disrupting user comfort

Step 2: Redesign the database to a new format with additional functionality and language capabilities

Step 3: Migrate to a true CMS system (currently in progress)

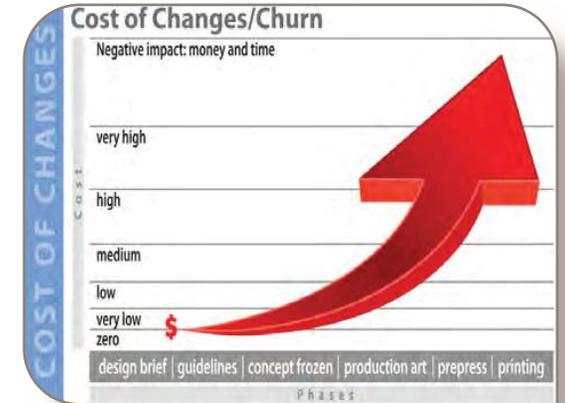
We started by conducting problem-solving sessions to identify the source of errors, which revealed the need to develop further metrics and actionable strategies. At the same time, our strategic planning committee initiated its work with early mapping of their overall process, which led to many very important insights — including the fact that their process had no clear beginning or end.

We created a first-generation FileMaker Pro (FMP) copy doc database. Actionable metrics were generated (using our detailed KPI reporting), to build a solid case for a new system. The FMP database was designed to organize copy with the goal of accommodating the migration to a CMS system that utilizes design templates and allows copy to flow easily between software environments.

Additionally, our Phototype team collaborated with a cross-functional team of 20 client associates for deep problem solving and root cause analysis. Detailed strategic plans were generated and action plans later implemented.

Results

A new copy management system was put into place, which eliminated a \$1.5 million contingency budget for correcting packaging errors. As a result of continuous accuracy through this new copy development process, these funds were released and reapplied to productively grow their business.



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Case Study

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