

## Beyond PDF: Using the Web to Streamline Production

by Mike Bloom

Electronic blueline review and sign-off technology will dramatically reduce production cycle times, costs—and headaches.

Technological developments in computing and printing have readily made their way into the mainstream marketplace: the fax machine, personal computer, desktop publishing, Web-based transactions, and advancements in prepress, to name a few. Adobe's PDF (Portable Document Format) brings us closer to the elusive 'paperless office.' Yet, experience shows that technology is no magic bullet, especially if the implementation does not improve workflow.

### The Bottleneck

Missed deadlines, late changes, and rushed print orders cost money, create stress, and could send a client elsewhere. Creating the first draft rarely causes the slowdown. The review and approval stages of production remain particularly vulnerable to errors and delays. This scenario may sound familiar: A mail shop faxes a 17-inch form for review and sign-off. The form has screens, bleeds, and knockouts, along with a tiny 8-digit ID code in one corner of the page and personalization to handle a data file with many segments. Fifteen minutes later, you have 20 unreadable faxed pages to mark up and send to your client. After talking with the mail shop about getting a more readable fax, you decide to have a courier deliver a proof. At the mail shop, a laser printer must stop running a job to print your proof. If you are lucky, this happens in one day. Once you receive the proof, you mark it up and route it to the next person. New issues arise: will you send a fax or hire another courier? When the author or designer finally receives the changes, will she catch every one? Will you have to go through more sign-offs before final approval and mailing? The deadline approaches, and hidden costs surface.

For many businesses, review and sign-off still involve manual, step-by-step procedures. Sending a PDF by email or posting one on the Web certainly helps, but workflow problems could occur. Reviewers may send back conflicting comments. If they print and mark up the PDF, the process reverts to a paper-based one.

### Streamlining Production, Promoting Teamwork

Fortunately, tools exist that can help the direct mail industry automate review and approval. Adobe continues to improve the PDF, which now supports annotation and layering, providing a foundation for real solutions based on PDF technology.

The most significant time and cost savings result from solutions that facilitate collaborative content review. Steve Farrell of Integram explains, "In the DM community, we remain prisoners to hard copy/fax sign-offs. Electronic proofing allows us to move beyond hard copy approvals and expands the traditional approval process towards a team-oriented one." Electronic proofing streamlines production by using the Web and PDF to help reviewers in various locations, with different schedules, communicate and resolve their differences quickly. Individuals can mark up the same document or discuss issues in real time, capturing the discussion in an annotation. Though reviewers have the experience of marking up the document, the annotations are stored separately, resulting in an audit trail that keeps everyone involved 'in the loop.' Annotation categories help direct workflow, ensuring that reviewers focus on specific content, such as graphics or legal content. Automated response notification frees reviewers from having to continually check for new comments made by others.

Initially, only large companies had the resources to use such technology. With affordable access to increased bandwidth and the adoption of PDF as a standard for prepress applications, small businesses can overcome the limitations associated with paper-based proofing. They can also conserve resources such as paper and ink, although some situations require a hard copy proof. When it comes to color management, online proofing does not suffice, even with calibrated monitors. If you need to review a two-color letter with standard PMS (Pantone Matching System) colors, a pre-printed shell and personalization, electronic proofing works from blueline approval to personalization. You can start this process with your graphic designer and go virtually paperless through personalization sign-offs.

Incorporating electronic blueline review and personalization sign-offs won't make press checks and faxes obsolete, but it will alleviate the bottleneck that often causes approvals to take much longer than content creation. Current technology allows reviewers to proof the layout, copy, and general color scheme online, collaboratively, in a secure environment. Companies that leverage this technology to streamline production will gain a clear competitive advantage by providing a faster, more accurate method to get from draft to approval—a method poised to become mainstream in the very near future.

Mike Bloom, a 17-year veteran of the direct mail industry, is President of Production Plus, a full-service direct mail agency. Production Plus, winner of a 2003 Silver MAXI Award, provides direct mail production and creative services, as well as electronic sign-off and blueline services. Email: [mikebloom@propluspmc.com](mailto:mikebloom@propluspmc.com). Web: [www.propluspmc.com](http://www.propluspmc.com), [www.esign-offs.com](http://www.esign-offs.com), [www.ebluelines.com](http://www.ebluelines.com).