

Executive Summary

Why did we create a Periodic Business Review (PBR)?

The MPSA Education Committee has designed a practical “how to guide-book” that helps providers who deliver an MPS-led solution better prepare, manage and support a more disciplined transformation approach when implementing either a relatively simple or a more complex MPS solution to customers.

Feedback from our MPSA members indicated that many providers who are looking to establish and implement a Managed Print Services (MPS) contract, can lack the understanding, knowledge and readiness to effectively implement, support and manage many of the key business, technical and change management requirements necessary to support the customer’s changing business.

These essential requirements generally relate to a client’s environment and the impact that a client’s operating environment may change or be impacted by moving from a previous solution to a new MPS-led solution.

Therefore, regular, ongoing communication to all stakeholders must be a vital part of the design for any successful MPS implementation delivered. As the cadence can be fluid, we can only recommend regular Periodic Business Reviews. However, we would also advise you to call for review meetings whenever required.

In this Guide Book will we take a closer look at the following 3 key areas:

1. Strategy
2. Business and Financial Goals
3. People and Change
4. Deliverables

Strategy



Strategic Intent:

A Managed Print Services Periodic Business Review (PBR) is an active management process by a managed print services provider that is aimed at delivering (as well as over-achieving) on the agreed and measurable goals and objectives set out as per the managed print services solution.

Strategic Aim:

The strategic aim of the managed print services PBR is to provide greater transparency and communications on the progress and processes of the critical tasks and actions that are being delivered or inhibited in respect to the goals and objectives of the managed print services solution.

The outcome of this strategic aim is that through more consistent, mutually aligned and productive engagement, both the provider and client, as key stakeholders have an opportunity to address any shortfalls pertaining to their current commitments, but more importantly, they both have a chance to accelerate on the solution design.

Also, the various departments of an organization should be included within the framework of the Strategic Aim. Each stakeholder will need to agree on the fundamental tasks that will be delivered and measured via the managed print services and the PBR.

Strategic Goal:

The managed print services periodic business review goal is to ensure that the managed print services solution is delivered as per both parties (managed print services provider and end customer/user(s)) have committed and agreed upon via a Statement of Work, or contract.

General Overview:

We expect some managed print service providers will have their own version, style or elements of what they see as key critical or as general inclusions as part of an ongoing periodic business review.

This is expected based on the provider's core business competencies and key capabilities of services and the solution being delivered to the end customer.

It is also important to note that specific elements will change (or will be fluid) based on the requirements and alignment to the end customer's desired business outcome requirements and any specific contractual or governance requirements.

However, in general terms we expect managed print service providers will provide some of the following high-level initiatives to support the solution project/program being delivered and managed by the provider. These include;

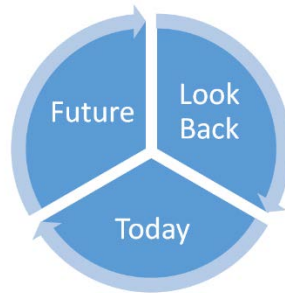
- Current progress of the scope of work being delivered
- Milestones measurement against plan – contractual commitments
- Governance, compliance or regulatory requirements (please refer to your local legal requirements, e.g., GDPR)
- Project timelines, implementation schedules, and project deliverables
- Financial budgets (ROI) and estimates as per agreed milestones
- Risk factors, roadblocks or project inhibitors
- Stakeholder engagement – including key sponsors
- Resourcing requirements – financial & human capital
- Subproject analysis - asset management register, device, technology and application software deployment, integration, security, Metrics (scorecard/dashboard), benchmark reporting, analytics, and billing details
- Transformational Progress – cultural, location, optimization, digitization
- Resolution plans – if there is a confusion or an impasse around a particular issue – what is the process to manage a resolution. This provides the parties a process of talking to obtain a resolution rather than an alternate legal action.
- Marketing Communications
- Education & Training program
- Survey deployment (throughout the lifecycle of the contract/agreement)

Lastly, the cadence of the periodic business review will be dictated by the service provider and the end customer. Depending on the scope/size of the managed print solution—the PBR may need to be carried out at different intervals. More often during the early phase/deployment of the managed print service solution, or due to the complexity and the number of stakeholders involved—the occurrence of the PBR will need to be discussed, so expectations are met.

Business and Financial Goals



Simple customer retention results in financial benefits. Regular customer reviews strengthen their relationship with you and open opportunities to expand your footprint. Through an honest exchange about the overall account health, it reduces or eliminates any surprises that might impact your customer's decision to renew with you at the end of the contract term.



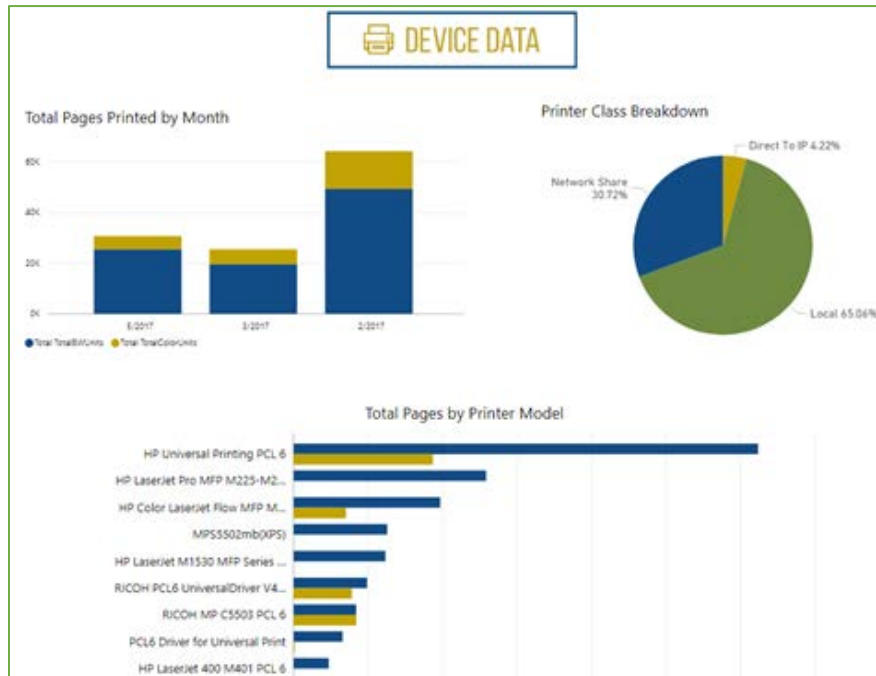
A Look Back - Return on Investment PBR - RO

- Reinforce why your customer purchased the product(s) and or services in the first place (benchmark & value)
- Show the value you delivered in the form of numbers
- Review and measure against your promise (benchmark & value) to deliver the product(s) and or services within the specified period of time

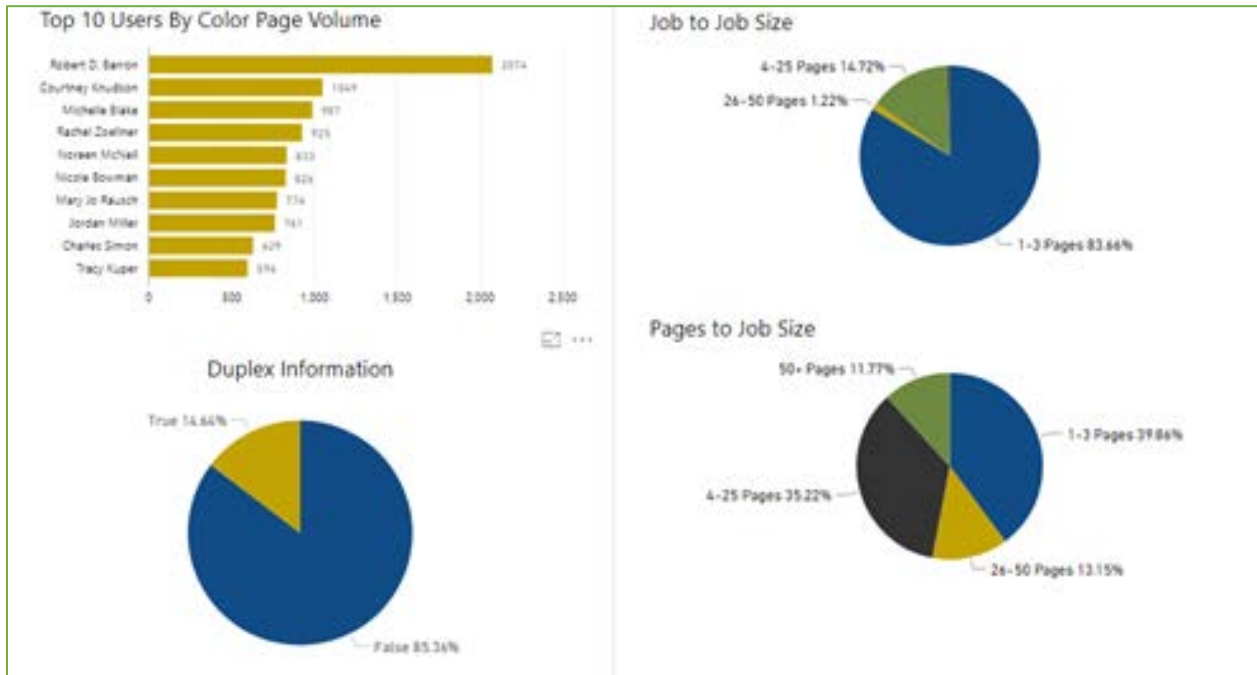
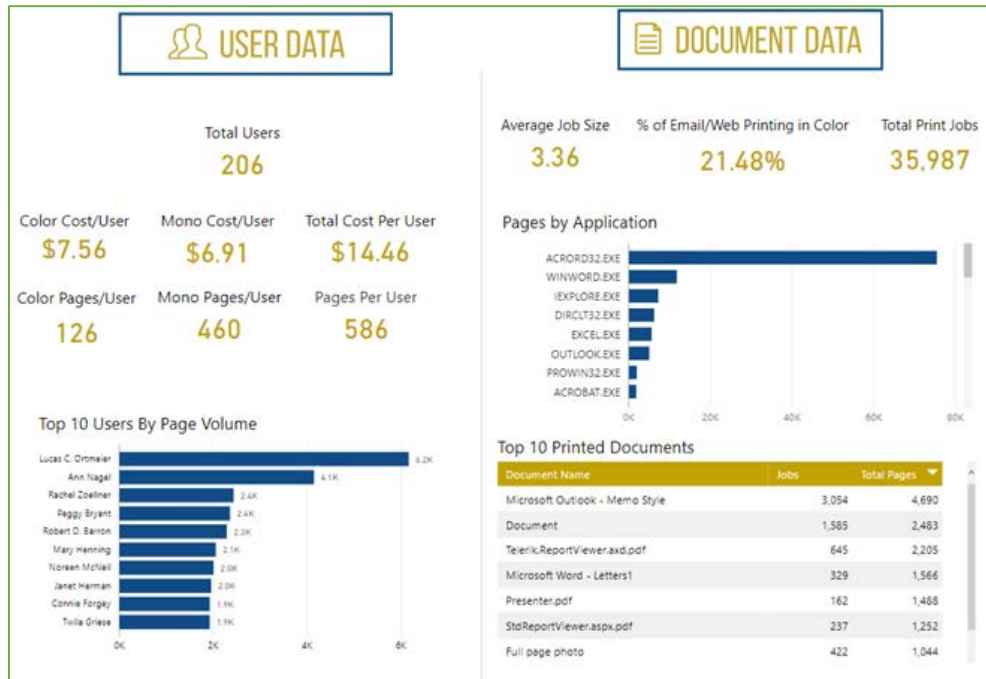
Today - Provide Data (Customer Health Report Card)

- Customer engagement with you demonstrates confidence as a trusted advisor
- Historical customer relationship data (i.e., length of customer relationship)

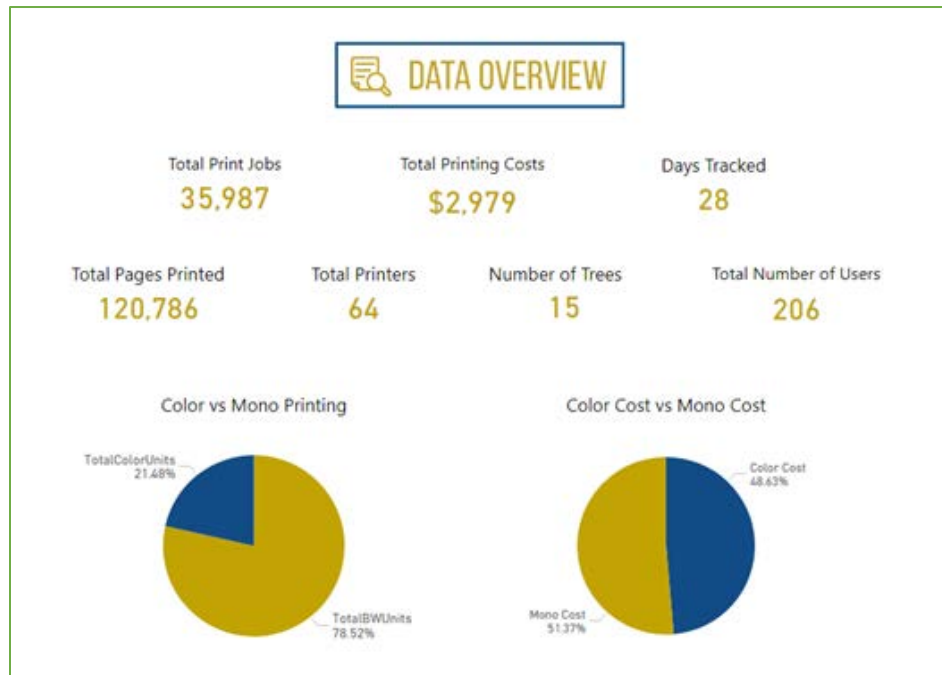
- Show benchmarking data, comparing what and how they are doing against their competitors or industry standards
- Reconciliation of account financials (i.e., invoice review, discrepancies, departmental or cost center chargeback reports, budget tracking, etc.)
- Review budgets against initial benchmarks
- Report results showing % Savings and/or workflow improvements from goals set at previous meeting or PBR
- Fleet reduction/consolidation (Asset Report, Energy Consumption, Coverage, MADC, Under/Over Utilization, Uptime against SLA, etc.)



- User print reduction/avoidance (against Print Policy)

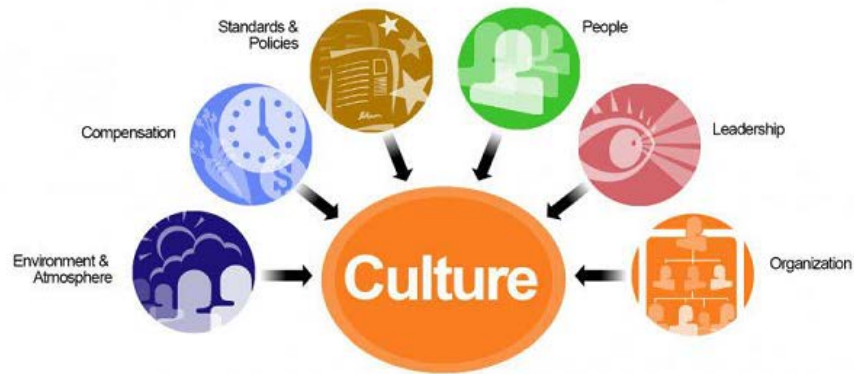


- Managed IT Services
- Scanning, ECM, DM
- Office Supplies
- Workflow Solutions
- Security Solutions
- Future Expansion – Revenue Opportunity



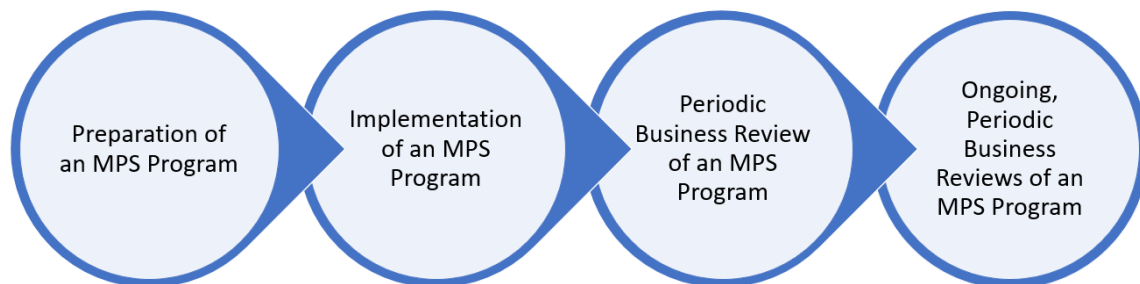
- Fleet Optimization (new, remove, replace, upgrade, etc.)
- Software
 - DM
 - ECM
 - Scanning
 - User Management
- Managed IT Services
- Training
- Full ownership

People, Communication, Change Management



Change Management is an integral of any Managed Print Services Program, from the beginning until the renewal or sweet/bitter end.

Regardless of size, the following is a high-level overview of any MPS Program:



Using guidelines for integrating and MPS program and controlling change will help the management team, and users of printing communicate throughout the agreement. Here is a sample:

“Changes to a current print setup will include changes to the related processes. These changes can cause fear and resistance to adopt a new printing environment, including hardware and software, and the related processes that will change.

To make sure a new MPS program is successful, everyone affected should understand why these changes are necessary, what the benefits are, and how these changes protect the organization’s interests.”

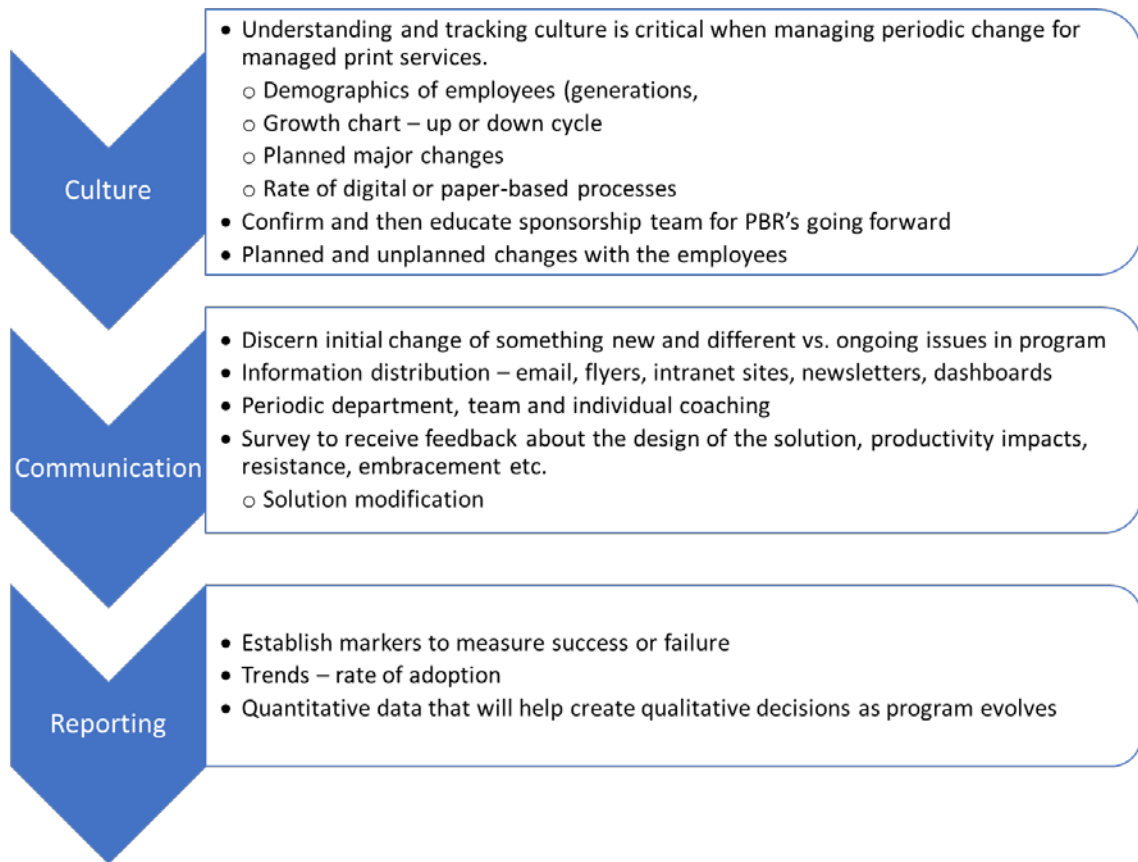
You should always consider a change management initiative for the following three targets, to not just ensure initial adoption but continuous and growing success of your MPS implementation:

People, Processes, Ongoing Coaching



In detail, these three target areas need to be seen to considering the following aspects from the early stage of planning the MPS program, executing the program, and when periodically reviewing the MPS program:

Culture, Communication, and Reporting

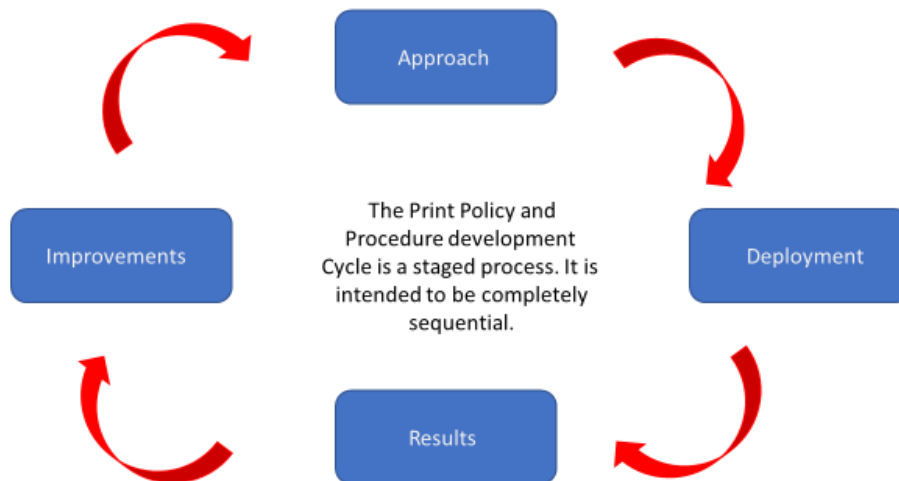


Just as hardware and software performance is under review during a Periodic Business Review, the team adoption and performance should be reviewed and re-aligned with the initial objectives where required. Also, support for the teams/individuals affected should be ongoing, e.g., via train-the-trainer initiatives.

Deliverables



Delivering Periodic Business Reviews (PBR's) can be accomplished in a variety of ways. The goal of the PBR is to gain agreement on what's being accomplished, discuss any conflicts or issues, share new information, and plan for the future.



The review can be delivered in person or remote via conference meeting depending on the size and scope of the engagement. Usually, the information shared is contained in a PowerPoint presentation and/or a printed Word document.

Method

- Company provided template – PowerPoint or Word
 - Consistent
 - Customizable
 - Flow

Content

- Dashboard for key metrics
- Current ops update
 - General Technology Updates / Innovations
- Measure against promise (KPI)
 - How deep depends on the complexity of the engagement and customer interaction
 - Device usage
 - User stats
- Trends
 - Mono vs. color
 - A3 vs. A4 usage
 - Single function vs. multi-function
 - Department specific
- Outstanding issues
 - Right-sizing or optimizing fleet
- Future State
 - Continuous improvement of the existing scope
 - Critical to quality considerations
 - What other services can be added on to capture a bigger share of the customer wallet
 - Document Management
 - Managed IT
 - Security assessment
 - Cloud services
 - Workflow enhancements

The meeting format is structured with built-in open discussion and question periods. The discussion ensures the meeting is dynamic enough to learn new information from the client that is unobtainable otherwise.

PBR's are an investment of time and logistics for providers and clients, and not one size fits all. Determining the value exchanged will help dictate the amount of time, energy, and cost to dedicate to each PBR. Since the provider is leading the initiative for the PBR, the client may need to be challenged to spend time in review. The client preferences for the review should be accounted for. However, the client should not dictate the meeting from happening.

- Establish frequency
 - Account Dependent
 - How – in person vs. remote
 - Preferred format
 - Attendees for large MPS contracts
 - C-Level contact, bigger group annually
 - VP and Director Contact, smaller group quarterly
 - Original stakeholder

After the review, send the customer a thank you for their time and a confirmation for the next PBR timeframe. Scheduling in advance is recommended, with regular reminders sent up until the actual meeting.

In Conclusion

This Periodic Business Review Guidebook was developed and produced by the MPSA following feedback from its members. It was designed to be the second of some MPSA initiatives that assist the broader MPSA community.

The aim of the PBR Guidebook is to provide a very easily consumed “*how to*” guidebook that allows many providers to improve their governance and processes around PBRs.

The PBR Guidebook is specifically not designed to be a comprehensive or all-encompassing approach to managing Periodic Business Reviews.

Following extensive feedback from members in 2017, it was clear that many people (members) within and across the industry required a better knowledge and understanding of the many factors that make successful business reviews.

The MPSA’s interest is to ensure the industry continues to evolve and improve best practice standards when it comes to “*how to deliver successful PBRs*” as part of a wider managed print services delivery and ongoing management of a client’s environment.

The MPSA as the premier global body for the industry acknowledges the importance of continually striving to improve the standards across the industry. The PBR Guidebook goes some way in delivering a process and methodology to ensure global best-in-class practices can be provided to any type or size of end customer regardless of the managed print service provider chosen.

The MPSA believe it is critically important for the industry and the community as a whole to provide end customers the ongoing confidence that they continue to receive the very best provision of service available. This PBR Guidebook is only a small component of the ongoing body of work that the MPSA continues to support.

Finally, the MPSA as a voice of the industry wants to ensure that our industry remains relevant as it continually strives to contribute positively to an end client’s business. The industry’s ongoing value is illustrated through its agility to remain innovative and adaptive to an ever-changing business environment.

Closing Acknowledgment

The MPSA executive committee would like to thank each and every one who has volunteered and contributed their valuable time, effort, and energy over the last 6 months. It is abundantly clear that the members of the Education Committee have worked tirelessly in collaborating to ensure that baseline global best practices for Periodic Business Review could be available to all service providers.

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Your Feedback is Requested

The MPSA aims to continuously learn, and improve the MPS Implementation Guidebook, to provide a more concise and valuable document to its members. We encourage you to visit the www.yourmpsa.org website to access our short feedback form giving the ability to strengthen our capabilities as we collaborate as an industry.