George - General Manager

Experience: 10 Years +
Computer Savy: Above Average

Goals

- Minimize cost to maintain a profitable margin
- Manage vendors/contracts to get optimal pricing
- Track inventory to keep outsourcing to a minimum
- Ensure efficiency across multiple facilities to handle demand
- Forecast demand to make staffing decisions & project revenue
- Maintain a knowledgeable experienced staff to limit errors/liability
- Oversee daily operations in order to act quickly if problems arise

Pain Points

- Cannot bill for labor for Chapter 7 & 13 mailings
- Creation of Certificate of Service is manual and labor intensive
- Billing clients is a manual, labor intensive process
- Lack of a centralized work-flow tool
  (Job Status, Communication, Billing, Reporting, etc.)

Tools

Communication

- Email
- Glip
- In person
- Telephone
- Text (SMS)

Revenue

- Excel - Projections, Billing, Reporting
- Harvest - Time Tracking
- Sortly - Inventory Management

"I do oversight over jobs, I help the team with any questions about deadlines, any type of client issue or outsource, I manage that. I don't like to outsource only sometimes."
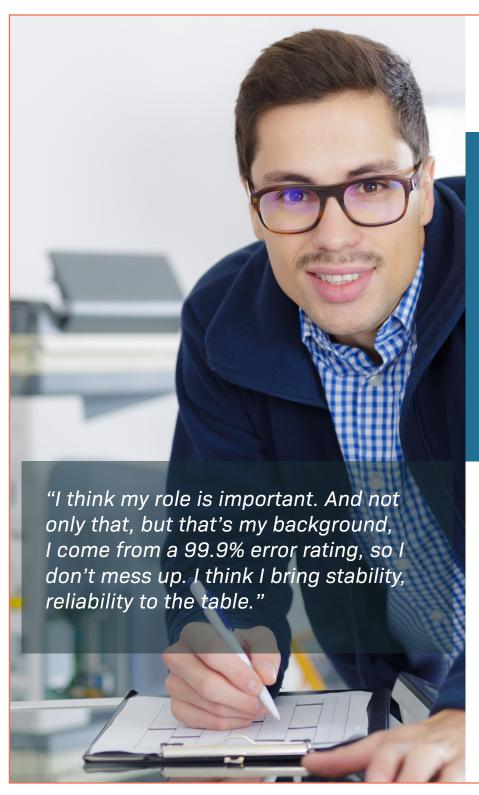
Paul - Production Team Member

Experience: 10 Years +
Computer Savy: Average

Goals

- Accuracy and error prevention
- Meet the deadlines, no matter what
- Support teammates - cross training & pick up slack when needed
- Make sure the facility is running smoothly
- Open dialog with the General Manager

Pain Points

- Lack of a centralized tool for communication and completion of jobs (many tools, multiple channels, in person conversations)
- Manual validation and transcribing of data (file naming, copy paste job details)
- Gray area for deciding which facility will take a job
- Variability of demand
- Late filings

"I think my role is important. And not only that, but that's my background, I come from a 99.9% error rating, so I don't mess up. I think I bring stability, reliability to the table."

Tools

Communication

- Email
- Glip
- In person
- Telephone
- Text (SMS)

Print Production

- Box/Google Drive
- Google Forms
- Google Sheets
- PrinShop Mail
- PaperCut
- Sortly
- Tabletop printers
- Canon OCE printers
- Pitney Bowes folder/inserter
- Pitney Bowes Meter Machine
- USB/DVD Burners