

# **The X-Fields: Workflow Is Key When Developing Effective Cross-media Programs**

Christoph Clermont

Keywords: automation, customization, digital printing, e-commerce, html, multimedia, personalized, software, variable data, variable data printing, workflow

## **Abstract**

There is little debate that cross-media communication can add value to print. But the multimedia landscape has become rather complex to navigate, especially with so many workflow technologies available. There are database experts, mobile platform specialists, HTML coders, back-end programmers, e-mail experts and progressive printers out there, all vying for business. No matter which system is selected, two key areas always come into play: media handling and data use. This technical paper will investigate coding (including the ongoing importance of APIs), rules-based engineering, modular campaign design, mark-up languages and automation levels that can ensure effective, results-based multimedia campaigns for print firms and their customers.

## **Introduction**

Cross-media communication has become somewhat of a complex field to navigate for marketers, especially with so many different workflow technologies and corresponding “experts” now available. No matter which system is selected for a given campaign, however, two key areas always come into play when adding value to print by way of a cross-media strategy:

1. Handling the media, and
2. Using data to drive design.

Centrally critical to any effective cross-media marketing campaign is the ability to work with data and use it. It is data, after all that can secure customer loyalty.

---

EFI, Inc.

With that in mind, a cross media project can start in one of two places when it comes to data, and a good cross-media solution should cover both scenarios. First should be a cross-media platform that can originate with data as simple as an Excel data sheet, where the content is loaded to build a campaign and then results are exported from the campaign in graphical/dashboard or data table formats.

Second is a more complex capability that enables integration with customer data systems using an application program interface (API). API technology has been available since the early days, but there are different ways to use API today in order to get data back to your CRM (customer relationship management) system. It's not monolithic, so if you have your own e-commerce and data systems, then the API can be extended and utilized to send out all emails for a campaign, for instance, and/or to create previews on websites via QR codes. It can even coordinate reporting.

Employing rules-based engineering, which uses predefined scripts, can take the API model even further. Rules allow developers to make assignments and apply them across different media; the wording may be slightly different for a text message, for example. EFI has developed proprietary "X" field technology in this area that makes it relatively easy to set parameters and define rules.

Freedom and security are two useful words when discussing API as tools. Easy and open architectures are crucial to accessibility, especially when an API is being used to talk to back-end systems. Theoretically, one could build a complete user interface around an API.

Designing modularly also is important for cross media. It is nice to have the flexibility to create new items, such as responsive design and Google Maps, as extensions. EFI encourages its customers to think in terms of having an open gate to their print solutions so that they can always put more information through certain areas. The real benefit is the integration of all this "stuff:" print, web and email – all connected, controllable and usable on one platform.

### **Speaking the Language**

Another interesting point is the <DOCML/> language, which makes it easy to begin and to personalize print via a web browser. Essentially, DocML is a descriptive mark-up coding structure that is easier to use than IDML (Adobe InDesign) documents. The concept is simple yet powerful, giving cross-media campaigns a much needed boost by allowing users to personalize any aspect of a document and to generate layouts (like personalized calendars) with Java script on the fly. DocML is a bit of a "secret weapon" for EFI's DirectSmile Cross Media marketing automation product offering.

Dealing with scalability and redundancy are additional important functions of cross-media programs that work well and increase response rates for customers. Storing vast amounts of critical data on a server is one matter, but ensuring that data's compatibility on every cross-media component is a function of robust architecture: how the system is designed and built. Note that sometimes it is necessary to start from scratch to execute true functionality because it is difficult to make existing systems scalable if they are not already.

A word of warning: HTML can be a challenge, especially for companies that have not hired professional experts in this discipline. EFI invented a "tree model" design to help print service providers (PSPs) with no in-house HTML expertise to build templates for their customers. The tree model is a way of organizing layouts like the branch of a tree, allowing for changes in direction either vertically or horizontally. It enables complex designs with no coding required!

The flip side of the techie coin is that internal staff members who do possess more technical experience can be in high demand (but low supply), leading to bottlenecks within the process. EFI's stance is that it is better to take this knowledge and wrap it in an extension item so that anyone can do the work of the expert. These items also can make the HTML5 world accessible to prepress departments. Such extensions are built into the design tool itself, allowing for a variety of features such as slide shows and animated, responsive design.

Data security comes into play when we discuss redundancies. EFI often recommends two database servers backing up each other. The main point here is having enough bandwidth, so to speak, so as not to overload and break the entire system. The bottom line with both scalability and redundancy is that you must be able to fulfill the needs of your customers' campaigns. How will you do that?

[SIDEBAR]

### **Levels of Automation**

EFI offers three levels of automation in its web-to-print and cross media marketing products: button levels, campaign management and marketing portals. Level 1 – the "button level" – is a reactive process, a direct user interaction that triggers an action by pressing a button, visiting a site or clicking a link. It does several things, including putting prospects in contact with a personalized website landing page (pURL) and using interactions to trigger activities. In other words, "When this button is pressed, send an email or an SMS text message." If someone registers for a training session, the message may simply say, "Thank you for registering!"

Cross-media Automation Level 2, Campaign Management, monitors operations. It can use records to call people to action, following up on a printed mail component with a reminder email, for example: “Don’t forget to register ...” It is quite simple for users to set the timeline, which could target the email for five days or 12 days on the heels of when the printed piece drops. Perhaps they want a different message sent to non-responders a week later.

The Marketing Portal is the third level of automation. It leverages both Level 1 and Level 2 to bring the entire process of cross-media campaigns to an even simpler level, making the process easy and clean. Does a customer want to have an open house? The Marketing Portal incorporates variable data, uploading their approved design and adding different times and topics for end-customers and prospects in different cities. Importantly, lead management is an integral part of this Level 3 automation.