

GETTING SAASY: THE IMPLEMENTATION OF MAGAZINE MANAGER AT
CANADA WIDE MEDIA

by

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B.A. (English Literature), University of British Columbia, 2010

Project Report Submitted in Partial Fulfillment

Of the Requirements for the Degree of

Master of Publishing

In the

Publishing Program

Faculty of Communication, Art, and Technology

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SIMON FRASER UNIVERSITY

SUMMER 2015

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ABSTRACT

In 2013, Canada Wide Media (Canada Wide), a regional magazine publisher based out of Vancouver, BC, upgraded its Customer Relationship Management (CRM) from outdated proprietary software – Media Services Group – to a Software-as-a-service (SaaS) vendor – Magazine Manager. Its implementation was considered a failure (by 2014 Canada Wide scrapped Magazine Manager in favour of Media Services Group’s later CRM iteration, Élan) and this report seeks to answer why. Through an examination of Canada Wide’s research pre-implementation, personal observation and contributions during implementation, and analysis post-implementation, this report provides honest and critical information to publishers seeking software guidance. The following aspects of software implementation are considered: the importance of research and planning as it related to the selection of the *right* software; the significance of data organization, storage, and transfer to a new system; the setup requirements for a new CRM such as management policies and product and display configuration; software integration requirements and concerns; and the role that entrenched human culture plays when training employees in a new CRM. To provide context and background information, this report also outlines the key differences between in-house proprietary, Application Software Providers (ASP), and cloud-based vendors such as SaaS.

Keywords: Magazine Publishing; Software Implementation; Software-as-a-service; Customer Relationship Management

ACKNOWLEDGEMENTS

I would like to thank my two industry supervisors. Originally Suzy Williamson who offered me a position at Canada Wide Media, and later Kim McLane for her thoughtful responses to my queries in uncharted software waters.

Thank you to my senior supervisor Juan Pablo Alperin for his patient and analytical approach to my project. Without his guidance, this report would not have taken the shape you read here.

To the numerous Vancouver cafés that have provided me workspace, internet, and coffee. The importance of these three elements to the final product is beyond measure.

And finally, thank you to my partner Trevor for his motivation and support in the final months of writing and editing.

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PART ONE: INTRODUCTION AND THE CURRENT PUBLISHING LANDSCAPE

As the publishing industry continues to rapidly evolve to include and adapt to digital offerings, so must its software. While publishing strategies often include sales, marketing, and content, the bones that foster progress and streamline its effectiveness must too advance. A lesser discussed but necessary component to magazine publishing – software – is paramount to success. Its role in organization and workflow, policy enforcement, and internal communication should not go unrecognized in the publishing world.

Throughout a three-month long internship in 2012, I observed severe workflow inefficiencies that could theoretically be remedied by an improved software solution. The situation at Canada Wide Media (Canada Wide) is not uncommon amongst publishers; it is a struggle to keep up with industry advancements that necessitate more complicated contracts with advertisers. As print sales dwindle and digital-first strategies supersede them, publishers have to find a way to deliver upon contracts and clarify return on investment to clients. Tracking, analytics, and reporting are more important than ever. The most economical and time efficient method in which to do so is through the use of software designed explicitly for this dual purpose: software that automates workflows thereby freeing employee time for other tasks and systemizes data so that analysis and reporting is simplified.

When I later joined the company in 2013, a software implementation was underway: Canada Wide was updating its Customer Relationship Manager (CRM) to Magazine Manager (hereafter MM), a software-as-a-service (SaaS) solution. I took the opportunity to analyze the company's research and ascertain how well the implementation process went, documenting methodology and identifying complications and solutions. In addition to analysis of the implementation process, this report discusses the types of software and applications available to publishers for further

integration. The observation of events in this report occurred between January 2013 and March 2014 but by April 2014 MM was replaced by another CRM software, Élan. The reasons for this are complex, but at its core MM was considered a failed implementation. This report seeks to comprehend why and outline what publishers can glean from its failure.

A BRIEF ACCOUNT OF CANADA WIDE MEDIA

Software implementations are sure to be different depending on the size and structure of an organization, so in order to situate the reader in the case study presented, it is important to have some context on Canada Wide Media.

Peter Legge founded Canada Wide Media in 1974 with “a borrowed desk and a magazine called *TVWeek*. Over the years it has grown into an established media company that is home to a diverse portfolio of proprietary- and custom-publications” (Lam 148, 2014). In 2015, Canada Wide’s proprietary brands include *BCBusiness*, *BCLiving*, *Award*, *Wellness Matters*, *Real Weddings* and *TVWeek*. These brands, especially *BCBusiness*, have become well-recognized regional brands with market presence online, in print, and at local Vancouver events. Under the umbrella of these brands, the company thrives in the fields of promoted content, special advertising features, newsroom style editorial, and special interest publications. The custom division publishes a variety of client-based magazines, the contracts of which range in business type (e.g. trade, lifestyle, newsletter, etc) and level of media involvement. Examples include the western CAA Auto Club magazines, AME BC’s *Mineral Exploration*, SFU’s alumni magazine *AQ*, BC Cancer Foundation’s quarterly *BC Cancer Forward* and BC SPCA’s children’s magazine *Bark!*. Over the past five years, the company has reassessed its management and made strategic marketplace moves to propel it into a competitive and innovative business position providing custom print and digital packages that resonate with audiences.

CANADA WIDE MEDIA IN 2012: RECOGNIZING THE NEED FOR CHANGE

Between 2012 and 2013, the period covered in this report, the company underwent some vital changes in workflow and CRM software. To provide context, outlined in the following pages are some snapshots of the management and activities during that time period.

In 2012 Canada Wide welcomed Gary Davies as incoming President and Karen Hounjet as Vice President of Sales.¹ Along with the management team already in place at the company, senior leadership issued a vision for the next five years. In this Strategic Plan, the company outlined eight main goals:

1. Update the CRM for use in sales to accommodate digital ad management.
2. Train staff so that they are capable of articulating Canada Wide's business priorities and engage in the development of its strategic goals.
3. Provide support for the senior leadership team to develop optimal organizational capacity.
4. Implement a data collection system for *BCBusiness* that can then be used as a model for all other brands.
5. Make all core brand websites responsive by 2014 and update the corporate site to showcase web and business developments.
6. Build multi-platform brand recognition for *BCBusiness*, ensuring all staff are able to articulate its success in the marketplace.
7. Reverse the revenue slide of the past five years and find new ways to create profit growth.

¹ As of 2014 Samantha Legge has assumed the title of President, and Rebecca Legge, Vice President of Sales.

² Each department accesses MSG via a department-specific interface and typically only know the software from this

8. Share knowledge gained through the above goals with our custom clients to further improve those business relationships (*CWM Strategic Plan, 2013*)

A common thread amongst these eight goals was the need for an intelligent data management system – a central repository to house client relations and related information – and a highly structured server system to organize Canada Wide internal documents. While internal systems can manage some of this data storage with the proper set up, to improve upon workflow and properly store sensitive client data, Canada Wide would require software to aid in these activities. It was Canada Wide’s CRM – the most widely used software in the company – that was selected for upgrade because it addressed the goals aforementioned. The selection was Magazine Manager, as will be discussed in Parts Two, Three, and Four.

David Taber, a CRM specialist and CEO of SalesLogistix, stipulates that a CRM can “[provide] executives with a 360-degree view of the customer relationship, enabling real-time responses to myriad customer problems, and improving sales productivity and predictability” (Taber, 2013). The senior leadership team at Canada Wide believed an improved CRM would help with productivity, but the debate hinged on what software best suited for the company’s needs. Taber’s observation that “a CRM system itself doesn’t transform anything ... what actually will change business performance are the behavior changes in your people and the process improvements enabled by the CRM system” is a sentiment strongly shared with management at Canada Wide (*ibid*). Senior leadership was looking not just to update software but also to encourage employees to operate more efficiently.

Media Service Group had been the proprietary CRM in use at Canada Wide since 2003, but it no longer served the changing needs of the sales and production departments. Mike Packer, Director of IT at Canada Wide commented: “finding a new way of managing our clients and our sales was

one of our number one priorities ... MSG doesn't share information well. It uses its own proprietary database that is very difficult to gain access to" (Packer, 2013). As advertising expectations shift, client data accessibility and system navigation become foremost issues amongst the sales and production teams. When clients request ad performance reports and marketplace analysis, publishers must be able to deliver. While MSG could not perform these tasks, the right software can do so. Amongst the contenders at Canada Wide were Magazine Manager, Salesforce, and Élan – a later iteration of MSG.

Canada Wide is not alone in identifying its software and applications as out-of-date. The downturn following the 2008 market collapse forced many magazine publishers to revise their business strategies. Simultaneously over the ensuing years, the consumers and clients with which publishers work have continued to advance in technology, marketing, and consumer reach strategies. Canada Wide identified software upgrades as a method by which they could catch up to the market and it's worth noting why software solutions proliferate.

PART TWO: WHY SOFTWARE SOLUTIONS PROLIFERATE

As magazine publishers see traditional ad revenue dropping and margins tighten, they must find savings and efficiencies wherever possible. Executive teams decide where (or whom) to cut and where (or with whom) to invest, as lean budgets become the norm. Jeremy Leslie, author of *The Modern Magazine* and editor of magCulture Journal writes, “where once there was a single business model (sell ads and sell copies) now there are multiple ways of making money and distributing magazines” (Leslie 9, 2013). According to Rebecca Legge, VP of Sales at Canada Wide, the market response is increasingly that advertisers want more customization, more evidence of ROI, and a more direct connection to their audience (Legge, 2015).

The restructure of Canada Wide’s software systems would better equip the sales team with the ability to book multiplatform campaigns, track trends, produce reports, and provide valuable analysis to clients. Furthermore, investing in software upgrades forces companies to re-evaluate their workflows and operations, with the future possibility of relieving staff of menial tasks that can be automatized so they are able to dedicate time to other projects. To provide context for Canada Wide’s decision to upgrade its CRM, the following snapshot explores changes in publishing software and the status of software and applications at the company in 2013.

CHANGES IN PUBLISHING SOFTWARE AT CANADA WIDE MEDIA

The magazine and publishing industry has seen its challenges over the past decade. Ask those working in books or magazines – online and off – and they can delve into the variety of reasons that publishing is *struggling*: online competition in the digital era; ad dollars shifting to websites with multimedia campaign capabilities; programmatic ad buying; media consumers’ changing expectations and limited attention spans (Moses, 2013; Carson, 2015). Whatever the reason, there are still successful business models in publishing, albeit their definitions may too be shifting.

In the twenty-first century, publishers have seen vast changes in software technology available to organize data, track trends, and generate reports. Increasingly specialized software and applications are designed every year, but that does not mean serial upgrades are necessary. An influx of options and subscription-style services provide publishers with better solutions and cost savings. Canada Wide has not upgraded its CRM since the 2003 implementation of a proprietary CRM called Media Services Group (MSG). To upgrade MSG – which was out-dated and difficult to navigate – after a decade-long hiatus, Canada Wide would have to pay a substantial fee for updated software. However, with the variety of software solutions available in 2012, management had the opportunity to upgrade to something contemporary that was in line with its company vision.

A full report of MSG's implementation process is recounted in Gloria Ma's Masters of Publishing Project Report, "Juggling Magazines, People, and Computers: Implementing an ERP System at Canada Wide Magazines." Explaining why MSG was selected for implementation, Ma writes:

[The management] believed that by integrating the departments with the MSG system, communication and information-sharing would be greatly improved. Better communication and information would, in turn, allow staff to be more effective, more productive, and more efficient as workers. The software was expected to serve as a catalyst to solve other related problems in workflow as well, including narrowing the communication gaps between the departments and allowing equal access to information (Ma 67, 2003).

A decade later, evidence at Canada Wide supports that the mere implementation of MSG was not a catalyst to solve workflow problems and communication gaps. This is in part due to a lack of

understanding of how MSG works and how it could be used to improve systems. Furthermore, a lack of training and policy enforcement means even long-term employees have difficulty navigating MSG; oftentimes this leads to dirty data as a result of software misuse. Perhaps if users were able to navigate and make use of the tools available in MSG, its application may have served to improve workflows as was hoped.

A valuable lesson is learned through the lack of success of MSG: training is paramount to success. Since MSG is accessed via department-specific modules, most employees have little understanding of how information translates to other workers.² For maximum efficiency all employees should understand the basic workflow and policies of the company. Proper access to data mitigates mistakes – human errors of communication – and results in more effective work through immediate access to information. In fact, more accessible and user-friendly software acts and reacts to the changes in the industry in real time, and luckily for publishers now, there are options available that can address these needs. At Canada Wide, the research and implementation of a new CRM in 2013 provided management with an opportunity to focus on adequate training to overcome the issues previously experienced with MSG.

Beyond addressing what MSG lacks, there are a number of ways in which software upgrades could also improve operations and efficiency. For example, contract entry could be simplified; client interaction for ad material could be streamlined with software that automatically contacts advertisers to request collateral; and accessibility to shared files could be improved. For instance, access to a flatplan through shared software rather than manual circulation and alterations frees up minutes in a production coordinator's day.³

² Each department accesses MSG via a department-specific interface and typically only know the software from this module.

³ A flatplan is a document for the page layout of the magazine including ad and editorial breakdown.

Software offers solutions to workflow inefficiencies, data management, and sales reporting and projections. To make the right selection, however, it is important that publishers understand their options and how they can impact business.

PART THREE: SAAS AND OTHER SOFTWARE OPTIONS

Publishing CRM software organizes data collected from advertisers, marketing sponsors, and other business partners. Most options fall into one of three categories: proprietary in-house software, Application Service Providers (ASP), and cloud-based applications. These three categories are described below.

Proprietary in-house software is developed specifically for the company's workflows. This is obviously the most tailored solution for publishers, as software is developed in-house and addresses workflow issues on demand. However, proprietary software is expensive to build and maintain, and typically requires on-site technical staff for updates and maintenance. Start-up costs are often beyond publishers' budgets, as they can cost hundreds of thousands of dollars to develop. Rogers Media, for example, is a media company that developed in-house proprietary software (read, they have more money than most regional publishers). In developing in-house software, publishers should work in flexible elements that require little maintenance to update; this mitigates the drain of resources required to develop critical workflow updates.

Application Service Providers (ASPs) are developed and built by software companies. Industry standards and best practices are often incorporated in to their development processes (Perks, 2003). These years of development and research allow these software developers a chance to program software that offers publishers reliable blanket solutions. They can also build on client feedback and release updates to increase usability. The downside to client-server applications is that publishers cannot directly control developer's improvement strategy; they can only provide feedback with the hope that future upgrades address their queries. In the meantime however, ASPs are a one-size-fits all solution for publishers. They are more cost-efficient than in-house software, but every workplace computer must have access to the ASP server. Lincoln Murphy of

Clarity business consulting explains the setbacks of most ASPs are that they are single-instance, lack scalability, do not have an inbuilt aggregate for data, and are not connected to a network (Murphy, 2009). Most ASPs do not include upgrade fees with the initial purchase so every time a new version is available, publishers have to pay for the update. Bill Claybrook of New River Marketing Research advises on the difficulty of software pricing over a long-term period:

On-premises vendors often argue that over a five-year period, your infrastructure costs to support your business apps will have paid for themselves. After the five-year period, SaaS is going to cost you while the on-premises solution has no incremental cost, even if you add more users. This argument should be questioned because software updates, new hardware additions, backup/recovery, and the like, are all ongoing costs. To be safe, you need to do the arithmetic on your own for the SaaS case and for the on-premises case (Claybrook, 2013).

At Canada Wide, the MSG platform implemented in 2003 had several updates available over the years that Canada Wide chose not to apply due to the associated costs. But as Claybrook advises, doing the math for ones self is worthwhile to understand how the costs will play out in the long-term. At Canada Wide, the company also considered the state of the industry; an unpredictable future makes it difficult to select an ASP with big upfront commitments, when a SaaS subscription presents a lower-risk and lower-upfront cost option.

Cloud-based applications are accessed online, making them available from anywhere with an internet connection. With cloud-based applications, “the software solution resides at the vendor's remote servers, rather than the customer's own servers, and is accessed via an internet connection as a service” (Kaviani and Weston, 2009). Software-as-a-service is a cloud-based application that is distinguished by multi-tenancy: “SaaS vendors develop, support, and deploy a single version of the software across all customers, enabling vendors to focus on on-going value-added innovation” (Workday, 2012). Software shared by multiple tenants translates to a reduced cost-

to-access in comparison to traditional hosted on-premise solutions installed and maintained by the client and includes the following characteristics:

- Customers share a single version of the software
- Customers share IT infrastructure and operational resources
- Updates are included with the service at no extra charge
- World-class security for data center operations applications, and data
- Service level guarantees including uptime, backup and disaster recovery
- Ongoing maintenance and performance tuning
- No perpetual licenses (pay-as-you-go pricing)

(ibid)

Like with client-server applications, subscribers can provide feedback and drive the direction of software updates. Also like client-server applications however, developers may ignore feedback so there is little guarantee that requests for updates are implemented.

Figure 1 provides a comparison of the characteristics of in-house proprietary, ASP, and SaaS software options. With an understanding of the software options, publishers can identify concerns and deduce which solution works best for their company.

	In-House Proprietary	Application Service Provider (ASP)	Service as a Software (SaaS)
Control	Software is controlled in-house	Software provider controls the system; data is stored on internal servers	Software provider controls the system; data is entrusted to the vendor
Cost	Expensive \$\$\$	Moderate \$\$	Low \$
Customization	Highly customizable	Some customization; may effect ability to update if customizations are incompatible with base code	Limited customization
Hardware	Hardware and software are owned and housed in-house	Clients provide software, vendor provides software	Clients provide software, vendor provides subscription to software
Integration	Integration with other software and apps is commonplace	Integration with other software and apps is commonplace	Integration with other software and apps is commonplace
Mobile Access	If programmed, yes	Commonplace, but functions may be limited	Commonplace, but functions may be limited
Security	Highly secure	Security risks due to online access	Security risks due to online access
Troubleshooting	Dependent upon in-house IT	Access to vendor provides troubleshooting capabilities; may be slow to respond	Multi-tenant structure is beneficial; ready access to training and troubleshooting
Updates	Slow, disruptive to production; costly	Frequent, but may effect customization; often incurs extra cost	Frequent; subscription includes updates

Figure 1 In-House vs ASP vs SaaS

THE BENEFITS OF APPLICATION SERVICE PROVIDERS AND CLOUD SOLUTIONS

In choosing software for their CRM needs, publishers must analyze their needs and understand what software and service providers can offer. With the costs of a proprietary in-house solution limiting Canada Wide’s options to ASPs and cloud solutions, as is likely the case for most regional publishers, more specific benefits and explanations follow.

Ability to uncover and fix bugs

Like Linus Torvald’s well-known saying goes: “given enough eyeballs all bugs are shallow” – with enough users and coders viewing and using the software, every bug can be uncovered and

corrected. This is beneficial to small regional publishers who can reap the rewards of having other tenants using the same software and uncovering problems, accelerating the rate at which they are solved. With MSG, Canada Wide was the only company with that particular iteration of the software, which meant that only their employees could find bugs and report them to the software provider.

Ability to react to changing workflows and beta testing

While in-house proprietary software may be built to accommodate very specific workflows, in order to adapt fluidly to evolving publishing needs, the entire process may have to be undertaken again if policies, products, and processes advance. ASPs and cloud solutions often offer the opportunity to be involved in the beta testing phase of updates and new releases, and while they may contain bugs or introduce potential data errors, it provides an opportunity to gain early access to the latest features. Advance access may be a hidden cost, but it puts you first; publishers can provide feedback to software developers, thereby guiding software development initiatives, while simultaneously gaining access to the latest version.

Ability to direct software development

While in-house solutions are directly influenced by company needs, client-server and SaaS customers are still considered consultants to the service provider. Though not as perfectly customized as in-house solutions, tenants can direct the development of the software and release of features. Software developers have their own agendas too: developing software that will entice more users to join and boost their bottom line. Being mindful of this, publishers can manage expectations. As more publishers use the same software, it becomes possible to craft something that adapts fluidly with the industry. There's a catch: software developers must decide upon an overall solution that accommodates as many workflows as possible. Essentially, every magazine and publisher has its own workflows in place, but these can be loosely applied to the natural

workflows promoted by the software design. At Canada Wide, in-house products and custom publishing projects for external clients have different workflows. Management has to consider both models when choosing a CRM, selecting software that best accommodates all the workflows being used.

SAAS SPECIFIC BENEFITS

Canada Wide chose a SaaS model because there are certain benefits that only it can offer. Specifically, SaaS updates are more frequent than those for an ASP; in part this is due to the central application hosting from the provider: there is a single base configuration used by all tenants making for simpler and faster development. Tenant data (analytics reporting on user trends) is available to the service provider meaning the software provider is able to view and consider the needs of its tenants through analysis of their usage habits. Furthermore, while in the SaaS model each tenant's iteration has limited customization – only within parameters set by the vendor – updates won't disrupt user experience. This is not the case with proprietary and ASPs, where an update could potentially uproot the customized features. At Canada Wide for example, the company customized some features in MSG. When the option to update the software came along throughout the years, management had to weigh the customizations against the updates as they may not be compatible with newer versions of the software resulting in skewed or missing data or unwanted changes to the workflow.

Publishers should weigh their participation in upgrades based on the following considerations:

- Cost: ASP and proprietary software upgrades often have hard costs. SaaS is covered in overhead.

- Customization: In ASP and proprietary software, customizations built over the years may change inherent function of the base version used for upgrades. All tenants in SaaS software use the same base configuration, though customization is limited.
- Time: Consider how long will it take to roll out updated software. If the update cannot be performed overnight, publishers with magazines in production may find it difficult to find a time update. SaaS updates are smaller but more frequent, therefore less disruptive.
- Data: Publishers need to prepare for double entry after an update to an ASP or proprietary software. With SaaS, all entries are stored on the cloud and updates should not affect production⁴.

These elements provide a picture of how SaaS is beneficial when it comes to upgrades. It was also determined to be a better-priced option. At Canada Wide, when IT was presenting software solutions to the senior leadership team, the hard costs of upgrading and maintaining a client-server CRM was significantly higher than a subscription. Even taking into account fluctuations of total number of users, the subscription would be cheaper over several years.

THE LIMITATIONS OF SAAS

While SaaS may provide a more cost- and time-effective solution in regards to upgrades, it also has limitations. The following is a list of concerns and recommended mitigations publishers considering SaaS should observe:

⁴ Double entry is the entry of the same contracts or information into multiple systems to ensure that nothing is missed. At Canada Wide for example, accounting still used MSG for billing while sales and production got familiarized with MM, but were slower to move into the new software. Double entry lasted the entirety of MM's lifetime.

- Security: There are several layers of concern when it comes to security: site security, communication security, application security, and database security. Security concerns are entrenched in online culture. Since SaaS is accessed online, publishers are storing sensitive information online where it is susceptible to hackers and data theft.

Recommended mitigation: SaaS vendors' best practices protect customer data through firewalls, user validation, and regular vulnerability checks. Rusty Weston, VP and Managing Editor at Ogilvy & Mather, and Shahbab Kaviani, VP of Sales and Marketing at HyperOffice, write in a 2009 white paper to "make sure the company has documented all its security infrastructure and protocols, and is willing to share this information" (Kaviani & Weston, 2009). They go on to list the following as important security features to ask of your software vendor: "encrypted data. 128-bit encryption is an industry standard; physical security measures like facilities, surveillance, guards ...; disaster management arrangements; and security records" (*ibid*). If the software vendor is in another country, publishers should research the country's data storage laws and limits, as well as the risks of data seizure in a country other than that in which the magazine (or other product) is published.

- Limited customization: While multi-tenancy helps to drive down costs, it also means a single code is deployed amongst all tenants so customization may be limited.

Recommended Mitigation: SaaS is typically designed to allow some level of customization, but training might be necessary. Under circumstances in which too little training is provided, this can prove to be frustrating; if a problem is encountered that could be solved through customization, but lack of training prevents the proper outcome, the workflow becomes less efficient than it could be. Furthermore, lack of training directly influences tenants' reaction to the new software; if it does not work the way employees are taught, they may react negatively toward it. Simultaneously, publishers

should be flexible enough to find methods to work within the limits of the software.

When customization is not possible, find another way.

- Data onboarding: The transfer of data between software can be extremely cumbersome, especially when transferring decades of information.

Recommended Mitigation: As will be discussed in Part Four, preparation is key to data transfer. For those without the in-house capabilities and necessary time, data onboarding services can help with this process.

- Automatic updates: Multi-tenancy allows the vendor to be constantly improving the code; updates are automatic and while most will be beneficial, tenants may be forced into updates that negatively affect their workflow.

Recommended Mitigation: Best practice for SaaS vendors is constant communication. Vendors should keep their clients aware of all upcoming upgrades. Furthermore, request training if any upgrades create markedly noticeable differences in workflow.

- Internet dependency: SaaS vendors operate on the Cloud. If for some reason the internet connection is lost, so is a user's ability to access the application.

Recommended Mitigation: A local backup can provide access to data if and when the internet is down. Keep in mind that while the internet may be down in the office, any other found connection will regain entry. Back ups are typically for the data only, not the service itself. It is also a good idea to check service level agreements with the vendor.

- Integration Limitations: Not limited to SaaS, software vendors are often tasked with offering integration with servers, systems, and applications. Publishers should be

sensitive to the limitations of integration capabilities. Not every piece of software will communicate – especially not two-way communication.

Recommended Mitigation: Research SaaS software integrations and discuss plans with your sales representative. They will be able to explain how their software communicates with others. Plan accordingly. At Canada Wide for example, MM was able to communicate with a preflight software Breeze, but only one-way. Changes made in Breeze would not be reflected in MM. Canada Wide viewed this positively because it controls the flow of information, though this might not be the case for all publishers.

With these concerns and limitations in mind, publishers can consider standalone software, suite, or other combination to create the most effective outcome. Sometimes bundling the right software will achieve optimal workflow, better the company's communications, and create a lean system that allows employees to spend their time on other projects. Part Four of this report examines the selection and implementation of Magazine Manager – a SaaS vendor – at Canada Wide.

PART FOUR: ANALYSIS OF THE IMPLEMENTATION OF THE MAGAZINE MANAGER AT CANADA WIDE MEDIA

When updating its strategic vision in 2012, Canada Wide considered how workflow inefficiencies could be overcome and set strategies for developing leaner processes. Questions such as the following were asked of management: how can departments be better managed; which jobs can be developed concurrently with changes in external business practices; and which activities can be automatized to free staff for other projects? A software update could address these queries and then the question became: what software will best improve Canada Wide Media's business practices?

In September 2012, Canada Wide Media selected Magazine Manager for implementation as its new CRM. The decision followed a successful campaign from IT and production. Director of IT, Mike Packer commented: "It comes down to that we need to get into a process that every other major publishing company has jumped to. We're not trailblazing here. We're catching up to the Macleans and the National Geographics ... using an automated workflow. We're still manual. We're in catch up mode" (Packer, 2013). Magazine publishers, especially small, regional publishers, may struggle to keep pace with the rapidly evolving tech scene. While larger companies may have the means to be on the cutting edge of publishing software technology, this advancement may be largely overdue for many publishers.

The decision-making process at Canada Wide was two-fold. Mike Packer and Kim McLane performed much of the initial research and presented options to the Senior Leadership Team (SLT). Together, the SLT chose which software solution would best benefit the company as a whole. After all, there may not be a one-size-fits-all software solution destined for use across multiple departments. At the time of the decision, in a 100-plus-employee company with various

departmental needs to fulfill, a compromise had to be reached to address as many issues as possible.

Canada Wide's criteria for a new CRM included:

- cost;
- suitability for sales, production, accounting, and circulation;
- elimination of place (cloud-based so that employees can access information from anywhere)
- workflow that closely resembled its current processes;
- ability to create and maintain client information in the manner that encompassed Canada Wide's strategic plan;
- and a support-network that would make the data transfer easy and provide training and support for staff.

A SaaS model was selected because of its online accessibility, the subscription model that placed it in a comfortable price point, as well as meeting the above criteria.

In a 2013 interview, Packer explains why a SaaS solution specifically made sense for Canada Wide: "it gives the ability to work from anywhere, so long as the sales reps [have] an internet connection ... they [have] full access to all the information at their fingertips" (Packer, 2013).

In Part Three, this report outlines the types of CRM software available and the benefits of SaaS, but deciding to switch from on-premise software (MSG) to SaaS (MM) required both broad software knowledge and targeted research in order to make an informed decision.

While software solutions can be useful tools for publishers, the reality is that executive teams do not always have the technical knowledge and direct experience of what a software implementation entails.

The implementation of Magazine Manager at Canada Wide Media was well documented and this report draws on that experience to explain the broad strokes of preparation, data transfer, testing, and troubleshooting. Among the topics of analysis are the importance of research and preparation, the significance of data and its transfer, the lessons learned from working with software providers, the necessity of integrating software, and the consideration of entrenched human culture. The lessons learned through the software implementation process at Canada Wide are useful to publishers for their honest depiction of what to expect and how best to plan and execute a successful software upgrade. To situate the reader, here is a brief summary of Magazine Manager and Digital Studio.

AN OVERVIEW OF MAGAZINE MANAGER AND DIGITAL STUDIO

Magazine Manager is a software service operated by Mirabel Studios, based out of Florida. They advertise as a “comprehensive magazine management software platform” (*Magazine Manager, n.d.*). The system manages CRM, contract entry, contract paperwork, tracks and automates ad material collection, and flows editorial and ads to digital editions. Users in MM include administrators, sales, production, and editorial. Administrators make changes to flexible components, add products and rate cards, approve contracts, and create flex reports.⁵

Administrators also set other users’ roles and abilities within the system: sales users enter proposals and maintain customer data; production users view proposals, contracts, and client information, pull runsheets, and access Mirabel’s Digital Studio for flatplan creation; editorial users only view flatplans, though optional add-ons could further integrate their workflow as well.

⁵ Flex reports draw information from the data input into the software to create a report that displays various groupings of information useful for specific users.

Digital Studio is a cloud-based storage facility for completed digital files. It is used by production to create flatplans and share them with other MM users in a "View Only" mode that controls the ability to make revisions.⁶ Limiting access to features mitigates the opportunity for mistakes throughout the production cycle. In Digital Studio, users can view PDFs of editorial and advertising pages to get a sense of how the magazine will look once complete. While editorial pages must be manually uploaded, advertising PDFs are linked to the job jacket for each contract and flow automatically from MM to Digital Studio.⁷ With these files, Digital Studio creates simple digital editions similar to content aggregators Uberflip or Zinio, which can be published on its newsstand (similar to the Apple newsstand). While this may be a solution for some publishers, Canada Wide chose not to use this as a publishing platform as there are limitations to Digital Studio's interactive capabilities; Canada Wide prefers to design in Adobe's Digital Publishing Suite.

THE IMPORTANCE OF RESEARCH AND PREPARATION

While it may seem obvious that research and preparation are important to the success of a software implementation, this section reiterates its significance. The steps instrumental to making a decision for a new CRM include:

- Determine if the current software works well for your company. Consider if new software is truly necessary or if the existing can accommodate changes in the industry.

⁶ A production point person collects input from editorial, sales and the printer to adjust flatplans, accommodating ad position requests, editorial requests, and split runs and inserts.

⁷ In MM, the Job Jacket refers to the location of each contract; the job jacket is much like a folder that contains contact and contract information.

- Identify concerns or problems with the current software. If the company does not use software for its CRM, identify manual operations in the workflow that could be improved by software.
- Consider which departments will be affected by a change in software and if they all require an upgrade.
- Have each department list their priorities for workflow improvement. Identify trends and anomalies.
- Determine what kind of software makes sense for the company (in-house proprietary, ASP, or cloud).
- Set up test accounts so that you can run a dummy production cycle of the software in consideration. Analyze which software addresses the most important concerns.
- Seek quotes and research contracts with software vendors.
- Research the setup requirements for an implementation.
- Identify support networks and training programs.

Once these questions have been answered, a company selects software and sets an implementation calendar. At Canada Wide, Packer suggested a one-year implementation calendar because data in MSG was in a state of disarray and he anticipated a problematic transfer. Unfortunately his suggestion was not observed and the management team accelerated the implementation to a mere four-month calendar. A major lesson learned at Canada Wide was that implementation calendars are set for a reason. Data transfer issues and setup delays caused grief that could have been avoided had a year long implementation been followed.

At Canada Wide, once Magazine Manager was selected, the steps immediately following included setup and data preparation. Areas requiring setup include products, processes and policy, and workflow requirements.

Regional publishers may have several magazines requiring setup. In addition to magazines, other products may include websites, apps, digital editions, and other projects. It's important to keep in mind that the ideal workflow for each product may not be part of the software's architecture.

Creative solutions and flexibility in workflow may be necessary.

Consider this example from Canada Wide: the company publishes several iPad editions.⁸ During product setup, management set these up as *digital* publications rather than *print*. In MM, there is an architectural distinction between print and digital products, but no further distinction. Canada Wide reasoned that since iPad editions are digital assets they should be set up under the digital banner in the software. This was miscalculated, as iPad editions are actually more similar in workflow to print products, which have regular issues – monthly, quarterly, or another number per annum. The start- and end- dates for these are not important, as each issue is labeled for clarity. *BCBusiness* for example is labeled by month whereas the *Westworld* magazines are labeled by season. This setup mistake caused grief as iPad ads had to be trafficked using the digital system when they fit better in MM's print production workflow.

Digital products, on the other hand, should be set up with flexible timelines. In this arrangement, contracts can be entered with any start– and–end date, and additional details such as total number of impressions or Cost Per Thousand can be included by line item for the entire campaign.

Canada Wide misstepped in digital product setup, depending on a workflow determined by MSGs limited structure. Legacy digital bookings from MSG had been entered on a month-to-

⁸ In 2013, Canada Wide published iPad editions for *Award*, *BCBusiness*, *Real Weddings*, *Westworld Alberta*, and *Westworld BC*. At the time of publication of this project report, Canada Wide is only publishing an iPad edition for *Award* and *BCBusiness*.

month basis resulting in the creation of separate line items for each month of a campaign (see Figure 2).

	Optimal Booking System	Magazine Manager Booking System
1	150,000 impressions June 21-August 12	28,302 impressions June 21-30
2		87,736 impressions July 1-31
3		33,962 impressions August 1-12

*Contract: Client purchases 150,000 impressions to deliver from June 21-August 12

Figure 2 Digital Contract Entry

Canada Wide chose this contract entry setup to maintain the integrity of its legacy entries but neglected to consider the added work required to enter contracts with multiple line items.

Needless to say, digital product setup was not well researched at Canada Wide, where the suggested contract entry systems were selected to accommodate a request from the accounting department to maintain the legacy workflow so that billing would remain consistent. Had more research and consultation gone into this decision, problems such as workflow inefficiencies would have been identified. A longer implementation calendar allows for setup and testing of a workflow; management can then determine whether or not a suggested workflow operates effectively. At Canada Wide the broken digital contract setup and entry was maintained throughout the MM's lifetime.

On the note of workflow and policy, the product setup and customization step of implementation is the opportune time to work in consultation with a software provider. For example with MM, publishers can template the contract entry system with a predetermined series of steps that all contract entries must follow in order to be successfully input to the system. This mitigates the risk that crucial information required by other departments is missed during the contract entry process.

Required fields such as ad material contacts, email addresses, and ad sizes ensure that the information required by production are included in the contract. Billing details such as pre-payment, billing instalments, and tear sheet requirements can also be set up as required fields. When setting up the template, it's important to strike the balance between necessary information and its associated entry time. Often the only way to know is through live analysis: putting live data through the production cycle of a magazine offers the opportunity to test how setup reacts and then adjustments can be made as necessary.

At Canada Wide, the company moved too quickly from testing to operating in the new software. The shortened implementation calendar pushed Canada Wide to work in MM before the company tested a production cycle. The preparation and setup steps required in implementation were not given their due and time constraints made it difficult to reassess decisions made early in the implementation. Once production was live in the new software, it became difficult to make alterations to the setup and policy.

THE SIGNIFICANCE OF DATA AND ITS TRANSFER

Client data is valuable to publishers. Not only is it used on a day-to-day basis to track activity, but can be analyzed to forecast trends. Data transfer between systems can be cumbersome. So much so that data onboarding is offered as a service to ensure that nothing is missed and that all necessary information is transferred when upgrading software. While a costly option, it is one to be considered by publishers, especially when weighed against the in-house time associated with transfer. This section will discuss why data is important to publishers, as well as explore what to expect when you're your transferring data. It will draw from the transfer at Canada Wide to outline some of the troubles there experienced. This analysis provides other publishers with information to better prepare and transfer their own data.

The CRM organizes all communication with clients and stores sensitive contact and billing information. Software that provides simple and meaningful access to this information is useful to achieve sales goals. Even better is CRM software that uses the information in its stores for analysis and reporting. For example, when sales representatives pull a report on advertising history for a client, they can glean information on historical ad spends, grandfathered discounts, and special promotions, as well as view how well these campaigns performed. There's a caveat: to analyze performance, sales representatives must continually input and update performance to provide the software with data to analyze. Some software, such as that for digital ad delivery, may include tracking as an inherent function.

With all of this information stored in a CRM, when transferring data between systems publishers must decide how far back records need to be kept and the level of detail to include for each record. According to data transfer experts the method by which companies should transfer data is to move “a minimal amount of data to the new system, but keep the old system active for about six months” to test what data is necessary (Brunelli & McKeon 7, 2013). During this six-month-period, publishers can transfer more data as required.

Management at Canada Wide was hesitant to lose critical information, choosing to transfer all data from 2003 to 2012, including all supplemental information.⁹ In retrospect, it is unclear whether such an extensive data collection is necessary to benefit current business. Arguably, sales representatives never look at the client notes from interactions over a decade ago, but

⁹ MSG limited the data transfer to records to those from 2003 onward; Canada Wide maintains legacy files that date back further, but were not maintained in MM.

management chose to transfer it anyways. Ark Rozental, cofounder and chief strategist of Reach Smarter comments, “the traditional reactive model of analyze and respond, where companies mine historic data to learn how transactions are performed, will give way to predictive analytics and proactive action” (qtd. in Houle, 2012). This kind of forward thinking means publishers need to start using information in a proactive way, rather than only analysing the past to predict the future. Client notes from 2003 are not a necessary component to predictive analytics and do not need to be transferred.

The data from MSG from 2003-2012 was a mess. Data maintenance over a significant length of time is problematic since the format of its entry changes as workflows and policies mutate. With little policy in place at Canada Wide, employees had been able to easily bypass required fields (required only by policy, not by the software) meaning that crucial data was sometimes excluded or misrepresented. To bypass a phone number for example, a user could enter 999-999-9999. According to Packer, while software may be smart enough to detect the correct number of digits have been entered it cannot verify that the correct data has been entered (Packer, 2013). The implementation of MM introduced the opportunity for management to set new requirements and policies though only to the extent of the software’s architectural capabilities.

Regularization of data is intrinsically linked to a clean transfer. Christina Inge writes about the data transfer of the American Marketing Association into Salesforce.com. They faced similar challenges to Canada Wide and other publishers:

The first hurdle to using Salesforce.com was that much of AMA’s data on current, former and prospective members was housed in legacy systems, from local Excel spreadsheets to event management platforms to email marketing lists. Once that data was imported into the Salesforce.com system, it could become the basis of everything from

member acquisition campaigns to speaker outreach. But to get that done, a host of sources needed to be identified, regularized, and migrated (Inge, 2013).

At Canada Wide while MSG had been the official CRM for ten years, employees often used alternative applications to manage data. In preparation for transfer, the data from every source must be organized and regularized for input to the final CRM. As a manual process this is time-consuming but paramount to success.

Some of the transfer problems encountered at Canada Wide could have been mitigated with more time to organize data in MSG. It’s advisable to organize data in the original software and its exported Excel spreadsheets before transferring any information to the new software. The examples below explore some of the difficulties of data transfer, explaining why organized data is so important.

Because of the way information is categorized, transferring data may not be as simple as A transfers to B. In an example from Canada Wide, the contact name field used in the legacy system was not compatible with the new system. Figure 3 below demonstrates a sample error: entries from the legacy system that contain a salutation in Line One automatically transfer to the First Name field of the new software. This error can also be found in other types of data entry fields such as contact or billing information.

Field	Legacy System	New Software	Data Transfer Error
Name Line 1	Salutation: Miss	First Name: Miss	Transfer from A-B may result in contact information displaying incorrectly in system B with Miss displaying as a First Name rather than Salutation
Name Line 2	First Name: Helen	Middle Name: Helen	
Name Line 3	Last Name: Keller	Last Name: Keller	
Phone Number	1-604-999-9999	(604)-999-9999	If transferred directly from A-B and System B does not pick up on formatting from System A, the phone could transfer as: (-60)-499-9999

Figure 3 Examples of Possible Data Transfer Errors

Data transfer provides an opportunity to start fresh. As previously mentioned there were few regulations to contract entry in MSG, and policy was inconsistently enforced. Because the search function in MSG was difficult to navigate, when sales representatives could not find the information they were looking for, they would often choose to input it as ‘new’ information instead. Consider this true example: a sales representative needs to enter a contract for Disney to advertise in *Westworld BC* magazine. They search for “Disney” in MSG but the search yields no results. The search function in MSG requires an exact case-sensitive match, so while Disney has advertised before but the contract had been entered under “DISNEY”.¹⁰ Multiply this search error and the versions of the same advertiser begin to accumulate. At Canada Wide the data from MSG often followed this trend. If transferred in its current state, the resulting problem is a diluted pool of data for analysis and reporting. Without manipulation in Excel, the records are not transferred cleanly to the new system and future analysis and projections are skewed as a result.

Canada Wide learned an important lesson through the data transfer process: clean data makes all the difference. But for those publishers without clean files, potential errors should be well researched by the IT department prior to data transfer. If there is time, thorough organization of legacy data should be prepared in spreadsheets before transfer to the new software.

For those publishers without the staff to prepare legacy data in house, data onboarding services are available to move the right data to a CRM. As a service, onboarding will help clients to prioritize their data, remove duplicates, and identify and correct errors. Justin Schuster, VP of Marketing at LiveRamp explains why clean data is important: it can be brought “into ... digital

¹⁰ Some of the variations on contract entry for Disney included Disney, DISNEY, CAA National Disney, and BCAA Disney. Each case was considered a separate advertiser, which results in poor ability to assess data and track trends.

marketing applications and media platforms, which enables [publishers to] reach customers with more relevant messages, justify budget increases, and improve the performance of [their] campaigns” (Schuster, 2014). The caveat is cost; data onboarding services have an immediate hard cost whereas in-house transfer can be written off as overhead. Publishers that do not have the budget for data onboarding will have to transfer data themselves, and if they have a history like Canada Wide or AMA, should prepare for a messy transfer.

WORKING WITH SOFTWARE PROVIDERS

During the software selection process, publishers make the choice between an in-house solution and working with a provider, whether that is a client-server, proprietary set up or a SaaS, cloud-based set up. With the latter choices publishers will be working with software developers and must prepare for what those relationships entail.

At Canada Wide in the beginning stages of the tenant-service provider relationship, a sales representative was in the office to help with product set up, train staff, and troubleshoot. The service-level agreement between a publisher and software provider presents detailed information about the software provider’s deliverables. Office presence can be negotiated in the terms of the contract, so for publishers that require extra training, building in face-time is valuable. This may limit the selection of providers if they do not have representatives able to travel. At Canada Wide, management negotiated for MM to send a representative for a month-long on-site period shortly after the go-live date.¹¹

¹¹ Canada Wide’s original 4-month implementation calendar set the go-live on January 4th 2013, but delays due to data transfer issues set it back a month further – and that is generous as there were still several errors to contend with. MM was able to accommodate sending a representative when Canada Wide was ready.

For publishers unfamiliar with the process of implementation and working with new software having a representative from the software company is helpful. Simultaneously, expectations of what that individual is able to help with should be metered. The representative may not be able to solve problems on the spot; solutions sometimes require programming or consultation from the software's engineering department and may be slow coming.

At Canada Wide, MM was being rolled out for use in sales, production, and accounting. The SLT set in descending priority: sales, accounting, and production operability and the MM representative's time was divided between the departments. Overlapping departmental needs take precedence, as their expedience will improve overall company workflow. For example at Canada Wide, the sales and accounting departments required rate cards and booking templates to be set up for each magazine.¹² With the setup complete, the overall workflow is improved: contract entry is simplified for sales, ensuring production receives the information it requires to proceed with fulfillment, and accounting is provided the necessary billing information to complete the process.

A small or mid-size regional publisher needs to assess its needs prior to a software representative's time with the company. Considerations should include analysis of the overall workflow as well as any specific customization required such as alternative workflows and digital products, and troubleshooting every issue that the team has come across since using the software. The better prepared a publisher is to ask questions, the better their time will be spent with a representative from the software.

¹² Rate Cards consist of a list of ad sizes and prices for each magazine. Once properly set up sales representatives can book only the options available, at the set price, with modifications and discounts applied afterward.

At Canada Wide the company had been operating in MM for a month before the representative's arrival. During this time the production coordinators were tasked to send Packer discrepancies between the data in MSG and MM: "Mike would like specific examples of some of the issues that are happening in MM. ie. Notes/Contracts/Info that is in MSG but is now showing up in MM" wrote Kim McLane, Director of Production in an email to production. When Mark Hirt – the MM representative – came to Canada Wide the production team was prepared with a list of issues that required troubleshooting: missing or misplaced data, workflow problems that required attention, digital product set up, and data flow issues to Digital Studio.

This preparation paid off for the production team as some of the problems they encountered were easily solved through training and troubleshooting with the representative. For example to expedite flatplan creation, the production coordinators require reports that display relevant information at a glance.¹³ The sales team require the ability to pull separate reports that display a different set of information that include sales figures, contra details, discounts, and special deliverables.

Being prepared with this question about how to generate customized reports, Canada Wide received immediate training. Hirt taught administrators how to create flex reports, which pull information from various fields in the contract and job jacket. Once populated, the extracted information is displayed on screen or can be exported to Excel for further manipulation. The most-used reports were added to MM's main navigation for quick access.¹⁴ Communication with

¹³ These reports include a list of the advertisers in an issue of a magazine, along with their ad sizes, position requests, ad status, and any other relevant information.

¹⁴ Canada Wide production used two flex reports on a regular basis: Print Ad Manager, and Digital Ad Manager, to track ad material as it was preferable to the ad tracking system built in to Magazine Manager.

the software vendor was crucial to the success of these reports, which were not part of the regular training manual.

Not all of the production team's concerns had been answered during Hirt's month-long training period at Canada Wide. If this is the case for any publisher, it is suggested to discuss any outstanding problems with your representative in person. At Canada Wide, the production team assembled a report outlining the outstanding issues requiring MM's attention. The most pressing items on this report were Digital Studio improvements including the ability to view flatplans as spreads, map a DPS ad size, colour-code pages, and create a function to designate inserts and split runs. Although these issues were brought to the vendor's attention, solutions were slow to be developed. This is a symptom of working with a SaaS vendor or ASP and publishers should be aware that it takes time for software vendors to respond, especially if programming is required to solve the issue.

Beyond in-person training, other methods of communication with software vendors include newsletters, online ticketing, and webinars. These communications have benefits and disadvantages. For example, communication of updates via newsletter can get lost in users' inboxes. However, supplemented by direct communication with management it can be effective. MM sends weekly emails to its users, which detail minor updates to the software. Occasionally a more important version release, which could interrupt service is also included in these emails. Any concerns with communication should be addressed immediately. After all, in a vendor-tenant contract, the vendor has a responsibility to communicate and prepare its tenants for any changes that effect workflow.

Finally, some vendors will provide an additional service through webinars for additional training. With MM for example, several webinars are hosted each week, the focus and trends of which are

typically sales-focused. Before committing the time to a webinar, establish participation requirements: is it relevant to the way the team uses the software; is extra training required in this area; are the tools outlined in the webinar topic currently being used by your team; and can the webinar be attended by an individual or should the whole team attend? If it seems truly worthwhile, then publishers should take advantage of the training. Simultaneously, vendors may use webinars to push paid-for add-ons. Webinars are time consuming, so relevance is a necessity.

The lesson Canada Wide learned through working with a software vendor is to be constant in its communication. Through frequent contact, the vendor will recognize its tenants in the marketplace and follow through with fulfilling software update requests. Expectations should be managed however: some improvements may take months or years to be implemented, as was the case with Digital Studio.¹⁵

SOFTWARE INTEGRATION

A CRM is just one type of software that when implemented and properly used can propagate a successful workflow. For magazine publishers, there are more and more processes that can be automated through software such as preflight, flatplan creation, and time tracking. In addition to software that simplifies workflow, publishers should research options for other operations such as digital ad delivery. Throughout this research publishers need to consider how well their CRM integrates with both existing software and could work with future software plans.

During the decision-making process at Canada Wide, the management team considered how MM would integrate with MSG (still used by circulation), FileMaker (used to track time and for

¹⁵ Digital Studio improvements such as ad size problems and ability to colour-code pages and view the magazine in spreads were solved approximately eight months after production requested the updates.

account billing), and DFP (used to traffic digital ad material). In addition to this, decision-makers should be looking forward and considering other types of software that would benefit the business. At Canada Wide, this included looking at flatplan software Pub Layout, time tracking software Freckle, and preflight software Breeze Advertising Solutions.

How few or many tools publishers want to implement is a company call, but keeping abreast of industry news, technology, apps, and software is a key component of a robust publishing practice. That does not mean every new and flashy application available should be implemented; publishers should be selective so that its software and applications are clean and promote healthy workflow.

Like all other aspects of implementation, software integration requires research and planning. The following points should be considered when outlining an overall software and workflow solution for a publishing company:

- Identify the ideal workflow. If possible, analyse this with a fresh perspective that does not take into account the policies and workflow currently in place.
- Identify which processes within that workflow benefit from software or applications for facilitation. Canada Wide identified CRM needs, flatplan creation, automated preflight, ad delivery automation, and simplified time tracking.
- Research options for each component.
- Analyse how well the software or applications integrate. Also consider how well they perform independently. Implementations take a considerable amount of time and resources so publishers should be prepared for a wave of installations rather than simultaneous go live.
- Consult with the various service and software providers. They are the experts and likely have experience that will ease the implementation.

- Set an implementation calendar.

The selections at Canada Wide were flexible enough for rolling implementation; they struck a balance between integration and independence. By 2014 Canada Wide decided to update its CRM once again. The new choice – Élan – could communicate with all of the selections for other applications Canada Wide had already begun to implement. The decision to scrap MM and pursue another software came from lengthy debate over MM’s operability. As this report suggests, there were severe data transfer and workflow problems. Additionally, IT found MM was incompatible with Canada Wide’s billing practices so the full implementation to all departments was never realized. For MM to be fully functioning and beneficial it would have to integrate not only with other software, but also with all of Canada Wide’s business practices – such as accounting – and it did not.

The importance of software integration should not be understated; used well and communicating properly, software applications can free up resources and encourage lean workflows.

ENTRENCHED HUMAN CULTURE

One of the biggest obstacles to overcome in software change is the office environment and people themselves. Entrenched human culture will play a role in software implementation insomuch that the employees using new software have to be willing and able to participate. Part of management’s role is to convince the office that their chosen path is going to be worthwhile.

Futurist David Houle writes “such phrases as ‘This is the way our industry works,’ or ‘we are on top, we are the greatest/we are the biggest/we have the largest market share’ are some of the most dangerous thoughts to think” (Houle, 2012). And these are some of the statements that employees will make. One cannot assume that every employee understands the shaping of the industry and the necessary steps to make sure that growth continues. At Canada Wide for example, some of

the software implementation resulted in roles changing as processes become automated.

Sometimes these changes also result in layoffs. In the face of change, a strong, focused, open, and articulate management will be able to explain changes to staff.

Going back to the time of MSGs implementation, in Ma's project report she interviews Suzy Williamson of Canada Wide who in 2003 said, "communication is a human thing" and a decade later this still resonates (Ma 67, 2003). At Canada Wide, some employees have a difficult time accepting that software can do what humans do. This is especially true in sales where client interaction is entrenched as critical to the happiness of client, so having automated software interact with advertisers rather than people is tough for sales representatives to accept. Unlike with the implementation of MSG of which Ma writes, MM was supposed to alleviate problems of interdepartmental communication. Its more sophisticated architecture would ensure that those information gaps between departments would be closed. In an example previously mentioned, the creation of templates with required fields for contract entry ensures that every department receives the information it requires – within reason, as some types of notes are still manually added.

Even once staff is using newly implemented software, publishers may encounter a problem: employees may attempt to make the new workflow operate as the old did. A CRM's architecture promotes its use in a specific way, so when users try to fit a square peg in a round hole, communication, data, and workflow problems arise. At Canada Wide, the production department – lauded as the advocates for MM – was at times guilty of prolonging the old workflow. For example once MM was fully operational, the production coordinators were supposed to be using Ad Manager to track ad material, but its mechanisms were unfamiliar.

Tracking ad material is one of the foremost day-to-day activities performed in production. “Ad Manager,” the application designed by Mirabel Studios to traffic ad material, displays as a window in the main dashboard of MM upon login. The window displays the following columns: an ad number which links to the job jacket; a preview icon of the uploaded PDF;¹⁶ Ad arrived; 1st proof; 1st changes; 2nd proof; 2nd changes; 3rd proof; 3rd changes; and Ad done. All columns are date stamped.

In MSG the equivalent ad tracking application categorizes ads in a different way: individual ads are not listed in the main display, but the following categories each display a number indicating how many ads are within that stage: contacted; follow up; ad material received; failed ad; pending approval; club ad; complete; cancelled; and inserts.

The coordinators found that while MM cut the number of clicks to view advertising details such as production notes, the overall structure of data display is less useful in MM. Perhaps a remnant of the old workflow, production insisted it was preferable to view ad status in one window rather than clicking into a job jacket to uncover the number of outstanding ads.¹⁷ While in MM, users view contract details and communication history from the job jacket – a click away from the main display – in MSG it is simpler to see, at a glance, the total number of ads outstanding, pending preflight, or approved. Unanimously, the department concluded that the MM ad management system was not conducive to Canada Wide’s workflow.

¹⁶ The preview icon links to Digital Studio. In Digital Studio, tenants have the capability to upload their editorial and ad files for a digital edition; since it is connected to magazine a preview of the page is viewable in MM.

¹⁷ Production notes are notes kept by production coordinators to track communications with clients.

The same reluctance to the software was evident in the sales department. Booking contracts in MSG had always been ad hoc. Suddenly, management was using MM to enforce policies through software roadblocks. Rather than learn the new process, sales representatives resorted to other means to enter contracts, fumbled through with mistakes, or piled their paperwork on the sales coordinator to enter.

When implementing new software publishers should look for areas that may be resistant to change and discuss how policy can be enforced. At Canada Wide the sales team was especially resistant to change so extra support was provided through sales coordinators to help ease the transition to the new software. The sales coordinators had helped in the CRM implementation and were fluent in MM's intricacies so were best positioned to train the sales representatives to update client information and enter contracts. Unfortunately their willingness and ability to help was often taken advantage of and the sales representatives never adapted to the new CRM. Software can only do so much and it is human culture that propagates change. Publishers and management teams need to be prepared for push back from employees and strike a balance or introduce incentives to use new software.

CONCLUSION

Overall, the implementation of Magazine Manager at Canada Wide Media was not a success. This is due in parts to a lack of preparedness, failure to stick to an implementation timeline, the functionality of the software itself, and entrenched human culture. While Magazine Manager lasted only a year, the lessons learned through its implementation were considered in the later implementation of Élan in 2014.

The implementation of new software is not simply drag-and-drop installation. Asked what he would do differently Packer says, “If you make a plan ... stick to it” (Packer, 2013). Small-to-medium scale operations now have access to more and more white papers and research documentation about SaaS and other software options. Of course, publishers should not blindly accept the advice of companies that use research as a means of self-promotion but seek out best practice documentation from reputable sources.

On the topic of planning, TechTarget published *Secrets to a Successful CRM Technology Upgrade* in which they insist that the planning phase “for a data migration project, which includes data profiling and analysis, is essential to making sure costs don’t veer out of control” (Brunelli 2, 2013). Moving data from a legacy system takes legwork: “Some data may need to be moved in an ad hoc manner because of its size and structure – or lack thereof” (McKeon 4, 2013). At Canada Wide dirty legacy data from MSG caused significant delays because data entry fields had not been properly used due to limited of policy and its enforcement. Delays will not only cost the company extra money, but add to employee workloads as duplicate entry may be necessary.

Furthermore, MSG was not phased out during MM's lifetime. In 2014 when Canada Wide scrapped the MM project and implemented Élan, a later iteration of MSG, the effect of triplicate entry on time-management and budgets was steeped with trouble.¹⁸ But publishing does not stop, so if the solution does not fit, management must continue to find one that does.

At Canada Wide, the company is shifting into the media realm, far beyond a print magazine publisher. Marketing events, multimedia campaigns, subscriptions, and other services can all be managed from a single platform, albeit the right fit and sophistication must be found, all given the data is easily accessible and organized. The implementation process taught Canada Wide the importance of maintaining data. Well-operating software is the foundation of a well-functioning and lean business operation. As the magazine publishing industry evolves, software and applications are a vital component to build and sustain customer relationships, present data and analysis in meaningful ways, and allow magazines to project and plan for a bright future.

As this report outlines, there are in in-house proprietary, Application Service Providers, and cloud-based software solutions for publishers. While Canada Wide selected a SaaS, cloud solution, other publishers may find that this report explains other options better suited to their company. The selection process should be well researched and take into consideration the size of the company, project scope, integration capabilities, and company strategy. The ideology here presented is that research and analysis are the keys to successfully selecting and implementing new software.

¹⁸ From April-December 2014, Canada Wide maintained three systems to ensure no data was misplaced: MSG, MM, and Élan.

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