

Web-to-print for Marketing Automation

Unlocking the power of Web-to-Print technology
for marketing portals



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Introduction

Web-to-print refers to using online platforms and technologies for designing, ordering, and producing printed marketing materials. It streamlines the ordering process for marketing products and improves the efficiency and cost-effectiveness of producing such materials.

In a marketing automation context, web-to-print technology enables companies to offer their corporate clients a more efficient and simplified way to order custom marketing materials like brochures, flyers, business cards, and other products. By utilizing web-to-print, companies can provide their clients with a user-friendly ordering process, increased brand consistency, and improved data accuracy in marketing materials.

Business decision-makers should direct their attention to web-to-print for marketing automation because it can significantly enhance the services they offer to their clients, resulting in improved efficiency and cost savings. Additionally, utilizing web-to-print technology can provide a competitive advantage by offering a more modern and streamlined solution for ordering marketing materials.

This white paper's purpose is to provide a comprehensive overview of web-to-print technology's applications in marketing automation. The focus will be on the benefits and importance of using web-to-print to make it easier for customers to order marketing products, including the role of templates, data management, user-friendly ordering workflows, and integration with the automation environment.

The white paper will provide insight into the various aspects of web-to-print technology and its function in marketing automation based on examples from real-world experiences. The aim is to educate and inform decision-makers in the marketing automation industry about the advantages of leveraging web-to-print technology for improved efficiency, cost-effectiveness, and customer satisfaction.



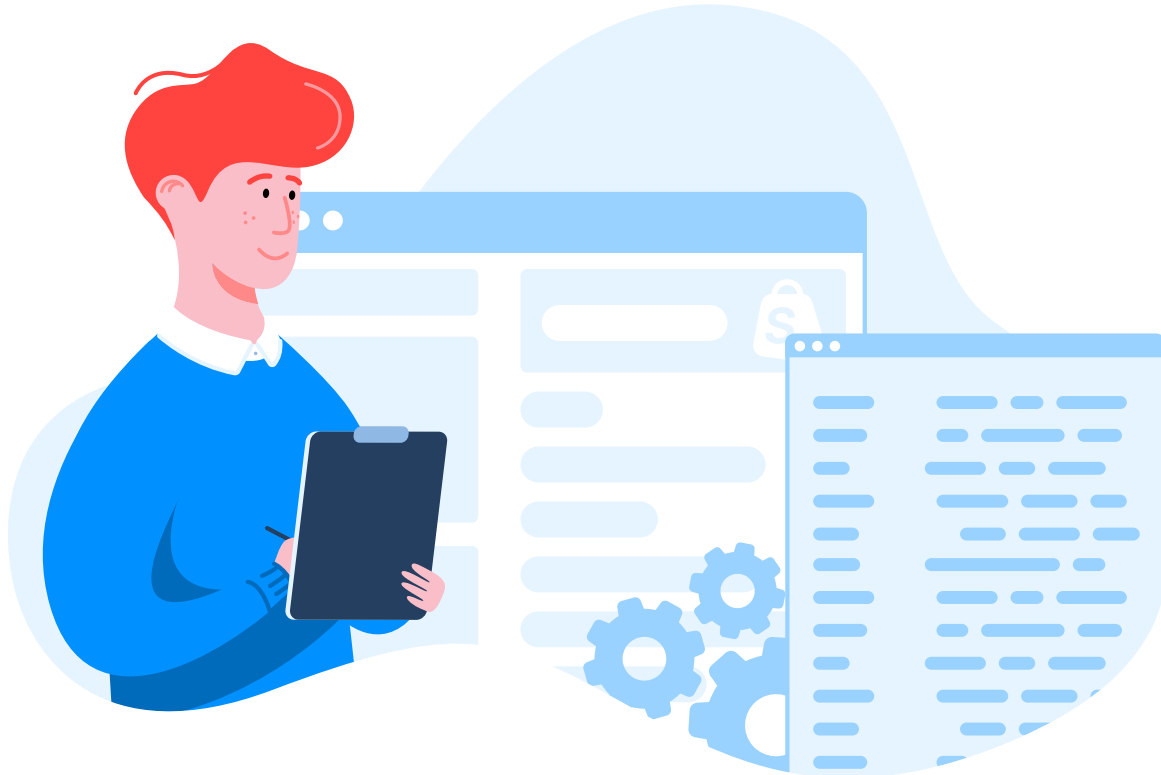
Dmitry Sevostyanov
CEO at Customer's Canvas by Aurigma

Chapter 1

Benefits of Web-to-Print Technology for Marketing Automation Services

Harnessing web-to-print technology for marketing automation can potentially provide several benefits to companies offering such services to their clients. From increased efficiency and cost savings to increased customer satisfaction, web-to-print technology can markedly enhance the services offered by marketing automation companies.

In this section, we will explore how web-to-print technology can benefit marketers and how it can result in better outcomes for the companies and their clients.



Benefit 1

Streamlining the ordering process for marketing products

By trimming down the ordering process for marketing products, marketing automation services can boost efficiency, reduce the likelihood of errors, and enhance the customer experience.

Online ordering platform

The web-to-print platform allows clients to place orders and approve proofs online, reducing the time and effort required for manual processes.

Real-time tracking and monitoring

The platform enables real-time order tracking and monitoring, allowing marketing automation services to quickly address any issues or requests from clients.

User-friendly experience

The web-to-print platform provides a user-friendly ordering experience, which improves customer satisfaction and confidence in the services provided by marketing automation companies.

Case study

A marketing automation company struggled with manual, time-consuming, and error-prone order processing for marketing products for their corporate clients.

They implemented Customer's Canvas, which made it easier for corporate clients to place their orders for marketing products through an intuitive ordering platform. The solution had the added benefit of automating the process for sending orders directly to the printing house, reducing the need for manual order processing.

Results: The company reduced the time spent on order processing by 50%, freeing up time to focus on other tasks. This productivity increase allowed the company to take on more clients, leading to a 20% increase in revenue.

Benefit 2

Increased efficiency and cost savings

In adapting web-to-print to trim costs and raise efficiency, marketing automation services can improve their bottom lines while offering greater value to their clients.

Time savings

The online ordering platform reduces the time and effort required for manual processes, saving time for marketing automation businesses and their clients.

Resource savings

The condensed ordering process reduces the resources required for manual processes, providing cost savings for marketing automation companies and their clients.

Improved productivity

The web-to-print platform enables efficient, effective ordering and proofing processes, making higher productivity possible for companies that offer marketing automation services and their clients.

Case study

A marketing automation company was facing high costs of printing and shipping marketing materials on top of a lack of control over the quality and timeliness of the deliveries.

The company implemented a web-to-print solution that empowered them to negotiate bulk printing prices with printing houses and manage shipping directly from the ordering platform. The new setup resulted in a 30% reduction of printing and shipping costs.

Results: The company delighted its clients by passing down these cost savings. It also improved its bottom line with a 25% increase in profit margins.

Benefit 3

Improved branding consistency

Marketing automation services can enhance the image and reputation of their clients through improved branding consistency, allowing them to promote their products and services more effectively.

Approved templates

Clients have access to approved templates, ensuring that their marketing materials adhere to established brand guidelines.

Consistent messaging

The web-to-print platform enables consistent messaging across all marketing materials, improving brand recognition and awareness.

Brand control

The platform grants marketing automation services complete control over the branding and messaging of their clients' marketing materials, resulting in improved brand consistency and control.

Case study

A marketing automation company faced issues ensuring branding consistency across all marketing materials for their clients, which led to confusion and decreased brand recognition.

The company implemented a web-to-print solution that enabled them to create and manage branded templates for its clients. This new system guaranteed that all marketing materials were consistent in design, messaging, and branding.

Results: The company improved the consistency and recognition of its clients' brands, boosting customer loyalty and the overall brand image. It ultimately benefited from a 15% increase in repeat business from satisfied clients.

Summary

Companies that offer marketing automation services have enjoyed proven benefits from their decision to adopt web-to-print technology. On top of the newly streamlined ordering process, greater efficiency and cost savings, and improved brand consistency, companies with web-to-print technology in their toolset have noticed a positive impact on their bottom lines, brand image, and overall experience of ordering marketing products.

Clearly, web-to-print technology can play a vital role in the success of marketing automation services, and its adoption is worth considering for any company looking to improve its processes and customer experience.

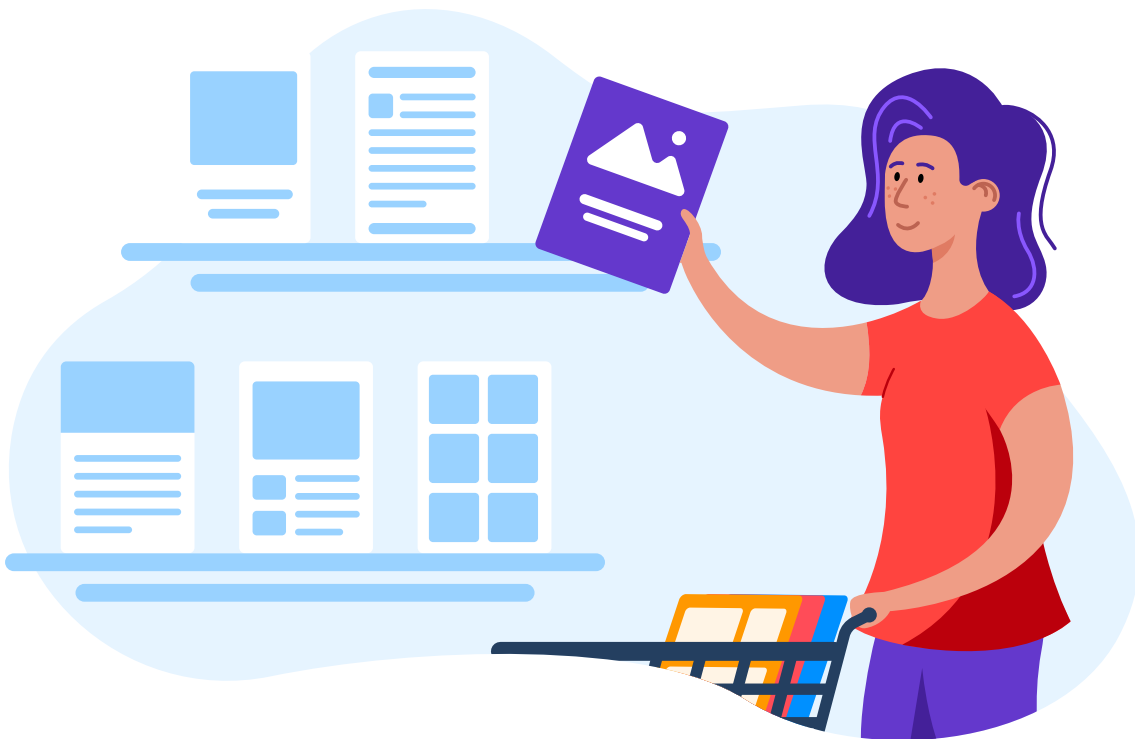
In the next section, we will dive deeper into the specific aspects of web-to-print technology and how it can impact a marketing automation service. We will examine the importance of templates and how they play a crucial role in simplifying the ordering process, improving branding consistency, and increasing efficiency.

Chapter 2

The Importance of Templates

Let's examine the critical role that templates play in the success of web-to-print technology for marketing automation services. Templates are the foundation for the ordering process. They help users keep their marketing products as consistent as possible while also optimizing production.

From creating and managing libraries to setting up templates for data binding, templates are a fundamental aspect of web-to-print technology that can make or break the success of a marketing automation service. Next, we will explore the significance of templates in more detail and demonstrate how they can help companies achieve their goals.



Creating and managing template libraries

Marketing automation companies should carefully plan how they will create and manage their template libraries to maximize the outcome. With a well-organized library of templates, businesses can quickly access the necessary design elements and ensure that all marketing materials meet their brand standards.

Customers can navigate a streamlined ordering process that helps them choose from a pre-approved selection of templates, reducing the need for custom design work and speeding up the production timeline. A centralized template library also simplifies updating designs, adding new templates, and changing existing ones. Keeping marketing materials current and up-to-date is no longer a mammoth undertaking.

Effectively creating and managing template libraries at the outset helps marketing automation services make the most of their web-to-print integration to meet their goals and deliver high-quality marketing products to their clients.

Businesses may encounter a few obstacles when creating managing template libraries, such as:

1. Difficulty in creating templates that match each client's unique brand and style
2. Inefficient processes for updating and verifying templates, leading to errors and inconsistencies
3. Limited ability to scale the template library as new clients are onboarded
4. Insufficient resources and technical skills to design and manage templates effectively
5. Time-consuming manual processes for searching, organizing, and updating templates

These three strategies can help companies streamline template creation and management:

Automating template creation

Utilize software that automates the template creation so templates can be generated from pre-existing data sources with minimal manual effort.

Centralized template management

Implement a centralized template management system where templates can be stored, managed, and updated in a single location. This system makes it easier to keep track of updates and version histories.

Template verification and validation

Implement a verification and validation process to ensure that templates are accurate and current, including checks for formatting, data accuracy, and overall design consistency.

Modular approach

Adopting a modular approach is one way to simplify the task of maintaining multiple company templates. This method involves creating reusable design elements and blocks like headers, footers, and common text styles that one can easily mix and match to create unique templates for each client. Modulation slims down the design process, reduces design time, and ensures brand consistency across all templates.

The process

You can organize the process of creating, verifying, and updating the templates in your automation system by taking the following steps:

1. Create a team responsible for template creation and management, including designers and data specialists
2. Develop a standardized template creation process that incorporates automated tools, centralized management, and verification and validation procedures
3. Schedule regular template reviews and updates to ensure accuracy and consistency
4. Integrate the template management process into your overall marketing automation workflow to guarantee seamless integration

Adobe templates support

Adobe InDesign and Photoshop are two of the most widely used graphic design software programs. Support for these programs is an essential component of web-to-print software as it enables marketing automation companies to use existing template libraries. Since their designers can continue to create templates with these programs, they don't need to learn new software to maximize the impact of their web-to-print integration. Support for software that designers are already comfortable with streamlines the template creation process and maintains the original design intent and aesthetic.

Customer's Canvas provides robust support for these programs, enabling marketing automation companies to easily use existing templates and continue creating new templates in InDesign and Photoshop. Not only does this support save time, but also ensures the final product meets the desired design specifications.



Case study

A marketing automation company faced a major challenge in managing a growing library of over 100,000 design templates for its clients, which included real estate agencies, franchises, and other businesses. The previous template management system was outdated and caused inefficiencies, leading to prolonged design approval times and frustrated clients.

After implementing Customer's Canvas, the marketing automation company streamlined its template creation and management processes. With the new system in place, template approval times sped up by 50%, and client satisfaction increased by 60%. The number of templates managed by the company increased by 20% without requiring additional resources.

The company used the solution to automate many manual tasks, freeing up valuable time for its employees to focus on other important projects. It also experienced a significant increase in sales because clients were more likely to order additional marketing products with the improved template approval process.

Implementing Customer's Canvas empowered the marketing automation company to tackle the challenges of managing a large template library and improved overall efficiency and client satisfaction.

How a marketing automation service creates and manages a library of templates can determine its level of success. An efficient and organized process for template creation, verification, and updates can streamline the overall operation and reduce the workload for the marketing automation provider and its clients.

Next, we will delve into the importance of setting up templates for efficient ordering. By providing templates that are easy to use and smooth the ordering process, marketing automation services can ensure their clients receive the marketing materials they need quickly and without error.

Setting up templates for efficient ordering

Customization options

Setting up templates with permissions for design elements can strike a good balance between providing enough customization options to meet the needs of the target audience and not overwhelming them with too many choices. By allowing editing for certain design elements while locking others, you can control the number of customization options available to your users and still give them a level of freedom to personalize their designs. This system improves the ordering experience by freeing users up to focus on what's important to them without feeling overwhelmed by too many options.

Meeting the printing specifications

The templates should be set up with consideration for the appropriate printing guidelines, such as product size, bleeds, and other specs, to ensure compatibility with the printing equipment.

Brand consistency

Companies should also build templates with specific brand guidelines in mind, including the color palette, typography, logo placement, and other attributes. Enforcing these guidelines through design constraints and locking certain elements will help prevent unintended changes.

Data management

This feature binds data from external sources and automatically populates text, images, and other design elements within the template. Templates must have data placeholders that can link to an external data source through an API integration or with a CSV/XML file upload. The data placeholders should be clearly defined and easily accessible within the template design.

Summary

Successful marketing automation relies on tailored templates for efficient ordering. Businesses must consider factors like customization options, compatibility with printing equipment, brand consistency, and integration with the product catalog and ordering process. When done correctly, it can lead to a better user experience and an intuitive ordering process.

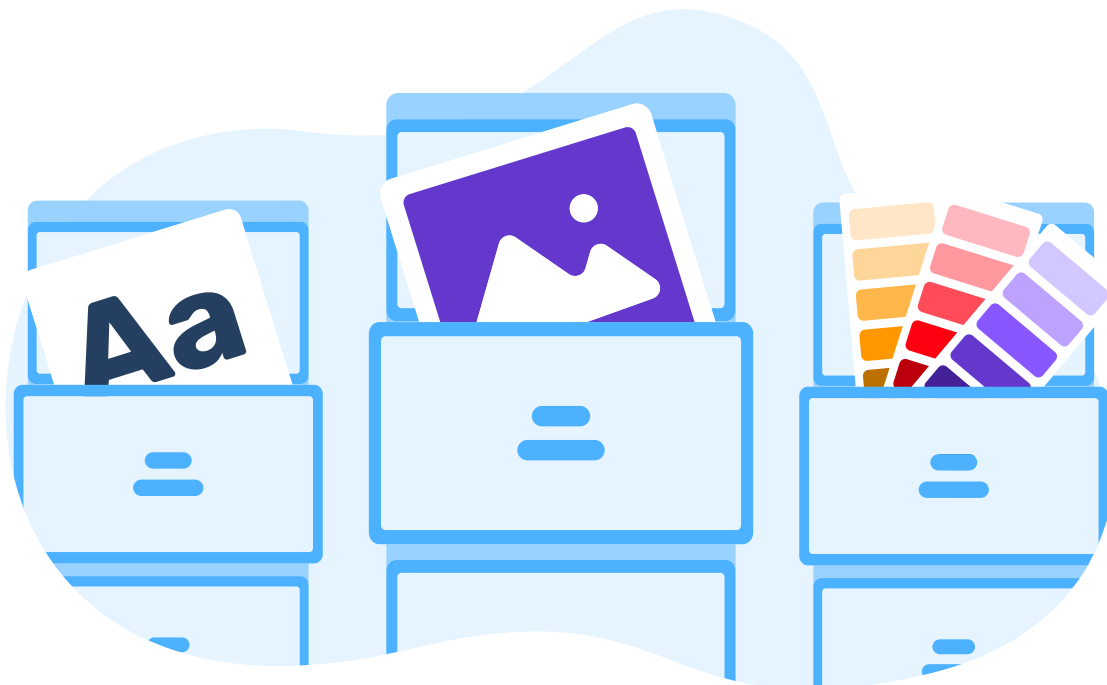
Now that we have discussed the significance of templates in marketing automation and how to create and manage template libraries, let's move on and gain a deeper understanding of how templates and data work together to personalize and automate marketing campaigns. This section will examine the various methods to make the most of the available data to create more effective campaigns, including data binding to automated data updates.

Chapter 3

Working with Data

In the world of web-to-print, how you work with data can determine the success of your business. By simplifying the process of integrating and manipulating data, you can build a seamless ordering experience for your customers with efficient, accurate results.

In this section, you will gain a deeper understanding of web-to-print's relationship with data and the various tools and techniques to leverage it effectively. From data binding to automation, we'll cover everything you need to know to best manage your data and drive your web-to-print business forward.



Preparing templates for data binding

Setting up templates to effectively utilize data involves several steps, including defining the data structure, mapping data fields, and establishing rules for data validation.

Keep the following in mind when preparing templates for data binding:

- The structure and format of the data source should match the structure of the templates
- The data source should have unique identifiers for each product or item
- Consider data validation to ensure the accuracy and completeness of the data
- Make sure the templates can handle large amounts of data and dynamically populate the fields in the templates
- Test the templates with sample data to ensure the data is correctly displayed and formatted in the templates
- Check that the data binding process does not affect the design or layout of the templates
- Plan for data updates and make sure you can easily update the templates with the latest data

Connecting data sources

The ability to connect and utilize various data sources is necessary for developing an efficient ordering process for a marketing automation business. Connecting the right data source can help companies manage data like client information, product listings, and other information fluidly with positive impacts on the entire workflow. These use cases demonstrate how marketing automation services can benefit from connecting data sources:

Client information

Companies can create a list of client information, such as location data and employee information, to use in their templates. This data can easily populate the templates to create a seamless ordering experience for the customer.

External data sources

In addition to client information, companies can also utilize external data sources like MLS listings or other public data. This data can integrate with the templates to provide customers with the latest information and elevate their ordering experience.

Loading data during the ordering workflow

Customers may also load their own data during the ordering process. They can upload CSV or XLS files to add and use their data in their templates.

When preparing templates for data binding, it is important to keep the use case and data source in mind. These details contribute to properly setting up templates so they work with data sources in an efficient and effective manner.

Ensuring data accuracy in marketing materials

Data accuracy can make or break a marketing automation campaign. Incorrect or missing data may lead to incorrect or incomplete marketing materials, which can harm the credibility of a company and negatively impact the target audience. The following are some common challenges and solutions to safeguard the accuracy of data in marketing materials.

Challenge 1: Corrupted data

Corrupted data can occur when the data source is damaged or has errors and may result in incorrect information displayed on the marketing materials. The data source should be regularly maintained with tools like data validation and error handling to avoid such costly mistakes.

Challenge 2: Lengthy data

When data is too long, it can cause layout issues and make the marketing materials difficult to read. Setting up data fields with proper constraints, such as maximum length or truncation, will keep the data within the desired length.

Challenge 3: Empty fields

Empty fields occur when no data is available for a particular field, resulting in incomplete and unprofessional-looking marketing materials. Businesses can prevent empty fields by setting up validation rules like mandatory fields or default values to guarantee users fill in all fields.

By addressing these challenges and implementing proper data management strategies, companies can ensure that their marketing materials are accurate, professional, and effective in reaching their target audiences.

Case study

A large marketing automation provider approached Customer's Canvas with the challenge of simplifying their data management process. They needed to ensure that the data in their marketing materials was accurate and consistent without manually reviewing each piece.

To solve this problem, Customer's Canvas utilized its powerful template engine to set up designs and map the design elements with the data fields, including texts, images, and even QR codes. This solution allowed the automation provider to easily bind their data to the designs, removing any doubt that the final product was always up-to-date.

The automation provider used Customer Canvas to streamline their data management process and reduced the time spent on manual reviews by 85%. The data tools from Customer's Canvas also helped the company create validation routines and specify length limits for the data, lessening errors by 90%.

Customer's Canvas helped the automation provider improve the accuracy and consistency of its marketing materials, saving time and resources. Their team had more time to focus on growing the business and providing high-quality marketing materials to clients.

Summary

Data is a cornerstone for successful marketing automation that can't be overlooked. The right templates, data sources, and management tools will help you quickly deliver more accurate and reliable marketing materials to your clients.

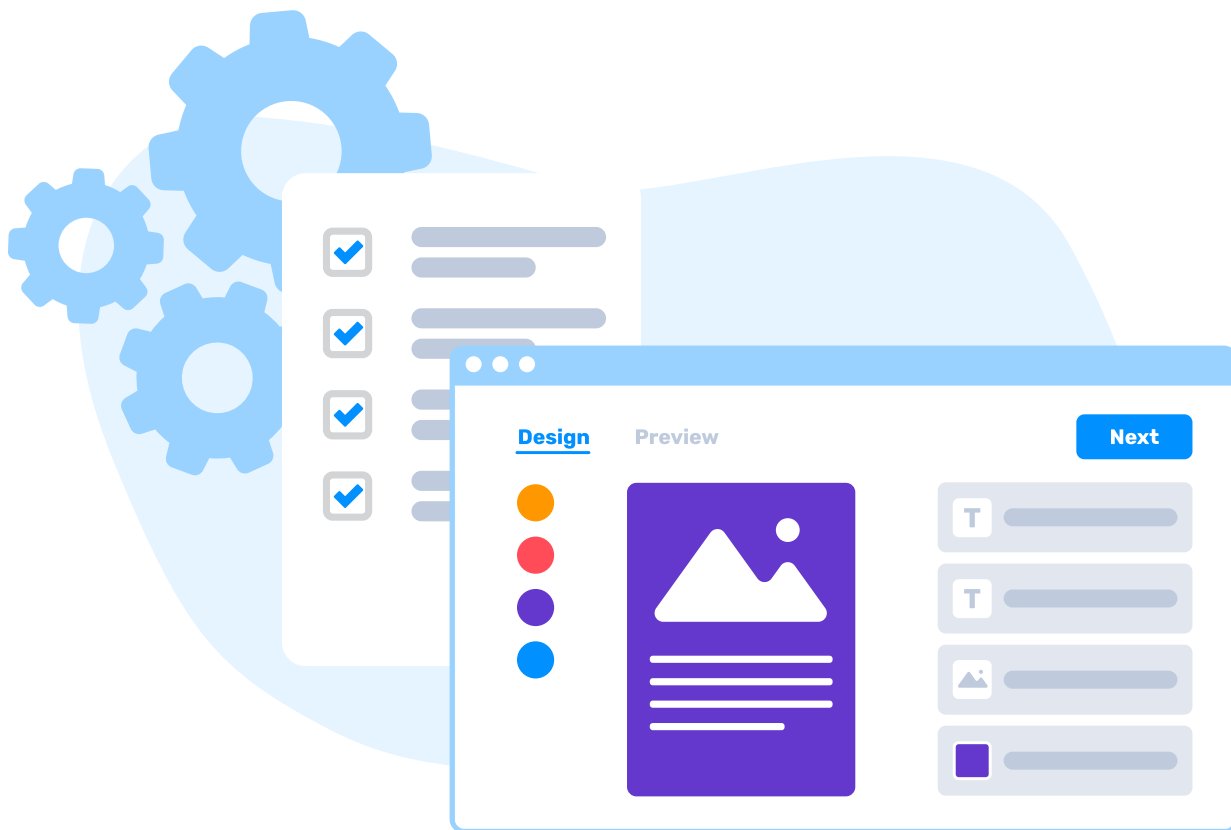
By implementing these data tools and processes, you can take the first step towards building user-friendly and error-proof ordering workflows. In the next section, we will dive into the design and implementation of these workflows, exploring the key aspects that drive their success.

Chapter 4

User-friendly and Error-proof Ordering Workflows

Creating a smooth and user-friendly ordering process is essential for building a successful marketing automation portal. However, even with well-designed templates and accurate data, various factors can contribute to a frustrating and error-prone workflow.

Let's explore how a marketing automation provider can improve the client's ordering experience by addressing common pain points like confusing navigation, unclear instructions, and incorrect data input.



Marketing automation platforms are complex applications designed to handle a wide range of tasks related to marketing, sales, and customer engagement. These platforms offer a suite of tools that help companies streamline and automate their marketing efforts, and they typically include the following key features:

Customizable branding

Companies can customize the branding of their marketing automation platform to align with their company image and values. They can make the platform their own by uploading logos, changing color schemes, and creating custom pages.

Product catalog management

Marketing platforms allow companies to manage their product catalogs, including the ability to create and update product listings, manage product descriptions and images, and create product bundles.

Data management

Platforms provide tools for companies to manage their data by importing and exporting data from external sources and managing data fields, validation, and length limits.

User role management

Companies can control access to their marketing automation platform by assigning different user roles and permissions to different employees, such as administrators, managers, and end-users.

Campaign management

Marketing platforms provide tools for companies to manage their marketing campaigns, including features to create, schedule, and manage complex marketing workflows and rules.

Advanced reporting and analytics

Platforms provide robust reporting and analytics tools that allow companies to track their marketing performance and make informed decisions about their marketing efforts.

Ordering Workflows

Marketing automation relies on intuitive ordering workflows, as they provide an easy-to-follow process for clients' employees to place orders. This feature is crucial for companies to manage their orders efficiently and give customers a positive ordering experience.

In a marketing automation platform, the ordering workflow involves many components that must work together to create a seamless customer experience. The main characteristics of a user-friendly and error-proof [SB1] ordering workflow include:

Seamless Integration

The ordering workflow should integrate with other platform components, such as the product catalog, data management, and campaign management, to maximize efficiency.

User-Friendly Interface

The platform should have a user-friendly interface that makes it a breeze for employees to place orders and for clients to make payments.

Error-Free Processing

The platform needs checks in place to detect and prevent errors in the ordering process, like incorrect product or quantity selections, to ensure that the final result is accurate and meets the client's needs.

Here is how the typical ordering workflow might look on a marketing automation platform:

1. The employee logs in to the marketing automation platform
2. The employee selects a product and customizes it using templates
3. Data automatically populates the template
4. The employee reviews and approves the final design
5. Higher-ups or other employees have an additional approval option
6. The client is billed for the ordered product
7. The final result is delivered as a print-ready file and digital image
8. The employee can track the order status and access reports and analytics

Choosing the right interface: Form-based vs. WYSIWYG

Form-based interface

The form-based interface is a commonly used approach that allows users to input data into pre-designed forms or fields. These forms are typically designed in a structured manner, ensuring that data validation is precise and any potential errors are minimized. This approach not only streamlines data entry but also provides greater control over the quality of data being inputted.

WYSIWYG interface

WYSIWYG stands for “What You See Is What You Get”. This interface allows users to edit and format content directly on the screen as it will appear when printed or published. WYSIWYG interfaces typically offer a more intuitive experience because they provide a visual representation of the final product but can also lead to less precise control and data validation.

Form-based workflows are more preferable for a standard ordering workflow in marketing automation than WYSIWYG workflows for several reasons:

Data accuracy

Form-based workflows ensure accurate and consistent data by specifying data format and validation rules.

Simplicity

Form-based workflows are simpler, reducing the risk of mistakes and speeding up the ordering process.

Customization

Form-based workflows can be customized to match the specific needs of the marketing provider, allowing for easy integration with existing systems and providing a better user experience.

Integration

Form-based workflows can easily integrate with other systems, such as payment gateways, inventory management systems, and CRM platforms. These integrations can help streamline the ordering process and improve efficiency.

Flexibility

Form-based workflows allow integrating multiple data sources, such as product catalogs, client information, and external data sources. Greater flexibility in the ordering process will improve the user experience.

Metrics to evaluate the efficiency of the ordering workflow

By tracking these metrics, marketing providers can identify areas for improvement and optimize their ordering workflow to increase efficiency and incentivize repeat business from happy customers.

1. Time-to-order completion — the average time taken to complete an order from start to finish
2. Order completion rate — the percentage of successfully completed orders
3. User satisfaction — feedback from employees and clients about their experience with the ordering process
4. Rejection rate — the percentage of rejected orders due to errors or incomplete information
5. Number of manual interventions — the number of times employees needed to manually correct or approve orders
6. Error rate — the percentage of orders with errors that needed to be corrected or re-ordered
7. Order volume — the total number of orders processed over a given period
8. Cost per order — the total cost of processing an order, including labor, materials, and technology expenses

Case study

A leading printing company faced challenges with its clunky ordering workflow that depended on roundtrips to the server to display design results. The lack of image-adjusting capabilities and slow preview rendering caused frustration among their customers and cut into the order completion rate. The company approached the Customer's Canvas team with the goal of improving the ordering experience for its customers and increasing the efficiency of its ordering workflow.

The company desired a more user-friendly interface that would instantly display changes in the design preview while the customer inputs text or images into the form. It also placed strict importance on the ability to adjust images (cropping and repositioning) to the placeholder. The Customer's Canvas team delivered a solution that exceeded the company's expectations.

The new interface was slick, intuitive, and provided an instant preview of the design while customers made changes. The image-adjusting capabilities allowed customers to crop and reposition images to their preferences, which helped to curate a more personalized design experience. The improved experience increased the order completion rate, user satisfaction, and order volume.

The retooled and improved setup achieved tangible results that benefited the company and its user base. The order completion rate increased by 20%, user satisfaction rose by 15%, and the order volume grew to 10%. The printing company was thrilled with the outcome and noted a significant upgrade in the ordering experience for its customers.

Customer's Canvas successfully guided the company on its journey to a polished new workflow. It managed to improve the overall experience for its customers and tune up the ordering workflow, leading to improved business outcomes.

Summary

Without a user-friendly, error-free ordering workflow, any ambitions of creating a successful marketing automation platform are dead in the water. When marketing automation providers focus on the experience of their employees and clients alike, their choices should put together a process that serves both these groups effectively. Using form-based interfaces with instant design previews and image editing capabilities can increase order completion rates, user satisfaction, and overall order volume. The integration of the ordering workflow into the automation environment is another key factor in achieving a smoother process with fewer hiccups.

Next, we will conclude with a few notes on integration in the automation environment, exploring the ways that a marketing automation platform can seamlessly integrate with other systems and tools to provide a complete and cohesive solution for businesses.

Conclusion

The benefits of integrating web-to-print technology with marketing automation services cannot be overstated. Creating and managing templates efficiently, working with data seamlessly, and providing user-friendly and error-proof ordering workflows are all building blocks for success in this industry.

Customer's Canvas clients providing marketing services have seen significant positive results from using web-to-print solutions. By streamlining their operations and enhancing their offerings, they have achieved higher order completion rates, user satisfaction, and overall order volume.

If you want to level up your marketing automation services, consider incorporating web-to-print technology into your workflow. With Customer's Canvas, you can experience the benefits firsthand of a robust and versatile web-to-print solution. Contact us today to learn more and take advantage of this powerful tool for your business.

Useful links

[Customer's Canvas website](#)

[Online demos](#)

[Marketing automation platform demo](#)

About Customer's Canvas

Customer's Canvas by Aurigma is a flexible web-to-print solution capable of performing almost any imaginable product customization scenario. This is a robust set of tools that leverages web-to-print technology to achieve your business's goals.

Our development team has specialized in image processing and web-to-print related tasks for more than 15 years. Our software is currently powering and fulfilling the web-to-print needs of more than 300 companies, including some major players in the print industry in the US and Europe, web-to-print platforms, and marketing automation solutions.

Although introducing new technology always presents some challenges, we consider ourselves technology partners in our customers' ventures and share a vested interest in reducing risks and project costs wherever possible. We have gained years of experience in web-to-print and we are eager to share it with you.

You may find more information about our product at customerscanvas.com, or contact our team at sales@aurigma.com.