

Brokering with JOBZ!

Many of our customers are not actually, or entirely, printers. Rather, they broker some or all of their work.

A brokerage workflow has much in common with a manufacturing workflow. For example, there is a sales rep. There is a set of specifications that is used to estimate a price. There is a customer proposal, an order entry and confirmation of order, and so on. There is a need to stay organized about what work is in production, and many details to communicate- delivery information, schedules, author's changes, billing instructions. There are sales commissions, sales reports, and the need for forecasting. Then of course there is the whole CRM (Customer Relationship Management) component- tracking your customers and prospects, which sales rep is assigned to each contact, and the need to conduct targeted marketing campaigns.

JOBZ! is designed for all of this, and if you know where to click, there's an entire subroutine that is optimized for the primary difference between a manufacturer and a broker: more than one supplier.

So instead of submitting an estimate request to "your" estimator, it is sent to a set of estimators appropriate to the job in question. Perhaps a job should be handled by a single supplier, but you want pricing from a whole range of suppliers to be sure you get the best possible price. Or let's say that you want one supplier to do the printing, and another to do the finishing. Then maybe a mail house to handle distribution.

No problem. JOBZ! has many tools to help automate this kind of business. And JOBZ! understands the business. For example, on the RFE (request for estimate,) you have the option of including or removing your customer's company name and contact information. You can categorize your suppliers by their specialty, and keep track of how well they performed.

This workflow also enables workgroup collaboration. The sales rep writes up the specs, for example, but the office manager sends out the RFE's and prepares the customer pricing, then issues the purchase orders if you get the job.

And of course, all of this communication integrates with your E-mail system, to keep your business moving at the speed of light.

Specific tools included in JOBZ! to broker work include the following- please ask for an online demo to see them in action, or view the Video Tutorials on the training tab of our web site.

- Multiple supplier request for estimate.
- Pricing worksheet that allows you to check the best prices from a range of different estimates and total them, then apply a markup.
- Pricing matrix to show your customer the pricing you have gathered, or to list multiple jobs that combined, comprise a project.
- Purchase orders to vendors. Any one job can have any number of suppliers.
- Miscellaneous costs matrix to record courier shipments, etc. that arise in the production cycle.
- Cost and profit calculations: At the end of the job, know how you came out.
- Commission visualization at quote, and calculation at invoice, based on percentage of profit.
- Suitable-for-mailing Invoice, prepared automatically as the job proceeds through its workflow.

Some of our most enthusiastic customers know the value of a business process management system that knows their business like an insider.