# Packaging Partners

Founded by four former sales reps from Pacific Packaging.

## Kate Quinn, Customer Service

Customer Service only places drop ship orders for stock – no quoting. Most of her customers need their products right away. MODs and anything they receive in their warehouse must go through the Purchasing Department. In addition, all purchase orders (paper) – whether the order is being placed by Customer Service or Purchasing – must be approved and signed by one of the four owners before an order can be placed.

Kate uses saved carts as a holding pen for all the orders that she’s waiting for approval on. She loves being able to go in quickly send each off through checkout. She also loves being able to see co-workers orders and carts, in case she has to help out.

One frustration is that with large quantities, we don’t come out and say that we don’t have enough to fulfill the order. Neither of us fully understood what she was talking about. It seemed she was saying that the order goes through, and then after the fact she finds out about back orders. I did notice her using Checkout as a means of figuring out whether something was on backorder, rather than clicking the availability link in the Cart.

We gave Kate the following scenarios:

*Your customer would like you to price some pre-stretched stretch film, 17” wide, 28 gauge.*

Kate was surprised to learn we offer this product, but she quickly found it by navigating through the widget. She did click on the width field a few times before realizing she could just click Find. She located the 17” film quickly.

*You heard Laddawn now offers wipers. You want to check out Industrial Medium Duty 8 ¾” x 17”, 60 GSM.*

She had not heard that we offered wipers, but she quickly located the new icon and radio button and had no difficulty with the nested menu. She did have to scroll up and down to scan and find the right item. We joked about GSM – “what’s that?” – she had the right idea of looking at the extended product description to learn more. Unfortunately, no explanation there.

*You need to quote a low density 9 x 12 x 2mil Wicketed Bottom Gusset bag; it has printing on two sides, but you don’t have the customer’s art.*

We asked Kate to try this out in spite of her not doing any quoting. She said she would call or email CE if she was asked to do a quote like this. “I’d need help; I’m so unfamiliar with this.” In spite of that she peppered us with all the right questions – ‘how many colors’ etc. - before even attempting to do the quote. She entered all the dimensions and opened the printing menu and clicked Let’s Go. As soon as she hit the blank canvas, she said she would give up and call CE.

## Bob West, Purchasing Agent/Buyer

*Note: As we transitioned to this phase of testing, we were informed that the computers needed to be brought down in about 10 minutes, which made us hesitant to interrupt and with lots of questions.*

We did not give him any scenarios to test because he had a printout of an actual RFQ from a sales rep.

He frequently refers to the catalog; on the front cover, he had noted “Clean Room.” He picked it up for this quote to see if we stocked the item being quoted and then wrote down the item number (375). He typed our web address in his browser. He entered the zip code, then entered the item # into the search bar.

When he got the results he wrote the price and availability info on the RFQ and then shared the item with himself “to have a record.” When he got to the Save Item popup he cross-checked with their system (DDI Inform) to see if they have a part number; he looked for a “P” because this was for Puerto Rico. He confirmed that they did have their own part number for this item.

Note – later we realized that if he types our part number into the search box, it doesn’t show a suggestion with their part number, but if he enters their part number, theirs comes up as a suggestion. [Aft first I thought this might be a bug, but it is working as designed; it’s a design flaw or omission – we envisioned what to show when users type their own numbers (screenshot on left), but not when they type the Laddawn number (screenshot on right). I created a ticket (44848, still a draft). -SP]



He will later type those notes into the Excel version of the RFQ and send it back to the Rep who will send it to his/her customer. He attaches the shared item email to the filled out RFQ.

He only refers back to his Saved Items list for MOD items.

He wishes we would provide the number of cases per pallet for stock, like we do for MODs. Sometimes he guesses, sometimes he emails CE. [RESEARCH: Is there a reason not to do this, other than that, unlike MODs, we don’t know if user’s intent is to combine different sized packages on a single pallet? I will discuss with Judy and others. -SP]

99% of the custom they order is received into their warehouse and broken down for multiple smaller orders.

## Joe Blair – Purchasing Agent/Buyer

We then switched over to Joe’s cube – Bob and Joe worked together in a fairly cramped space - he was ready to place a fake order for Bob’s quote. [In reality he would have to hear back from the sales rep (if the rep’s customer approved), then create the PO, then wait for one of the four owners to approve the PO. It’s at that point he would actually put through the order.]

I noticed that even though he had Laddawn bookmarked in his browser, he typed the address in. When he logged in, he started his search from scratch, working off of the printed RFQ and handwritten notes from Bob; Bob did not share the item with Joe via the website. I got the impression this was standard, and not just because this was a “fake” order. So Joe entered the part number into the search bar, or entered the item’s dimensions into the widget –or some other method? I can’t recall, Jeff, can you? – (No, I had a tough time following what he was doing.) and had to scrutinize the results to ensure everything matched up. Having Bob share the item or better yet, put it into a cart and share that, would seem to save Joe several steps.

After ascertaining he had the correct item, Joe added it to the cart and checked out. He paused at the addressing screen to show us that Bob’s name was in the attention line and that backing over it could not get rid of it. [RESEARCH – is this a bug or an issue with their preferences? Even if the latter, it is not a good experience this way. Emailed Val and Judy; will open ticket when Judy confirms the bug, 4/23/19 Opened ticket -45466 – 4/24/19 .]

Joe paid most attention to the ship date and warehouse on the summary screen, and not on the bundling screen where it first appears (and where changes can be made). He used his Windows calculator to record unit pricing (in his sales order documentation?)

After finishing up the demo of how he places orders, Joe did another search – I can’t remember why – but he said he likes the ability to enter dimensions into the search bar. Unfortunately, his particular demo was not working; he typed “Poly Bag n x n” and there were no suggestions. [RESEARCH THIS. This is not a bug; it’s just probably how it has always worked. Emailed JP about feasibility. He said it would be a lot of work. Keep an eye out for this. 4/23/19]

After finishing up with Joe (which is about when the computers went down) we spent some more time chatting with Bob. Laddawn is the only site they can quote custom online. They have a two-day turnaround with their other vendors, but with Laddawn and its share feature, they can get quick quotes out to their reps, which gives us a major advantage, because our pricing is usually “fair.” If he needs support from CE or CR, he tends to use email to get whatever it is in writing. If he has to deal with something “funky” like bottom gusset or polypro, he reaches out to Val. He had “clean room” written on his current catalog cover as a reminder of something new we offer. They think an email announcing new product offerings would be helpful; they’d forward it to their sales reps.

# Hill Packaging

Started out in the packaging business, but now sales of InkJet printers make up most of their business.

## Emily Philips – President (Danica’s boss)

Our appointment was with Danica but we were greeted by Emily who chatted with us for a bit. She pled with us not to F--- up the website. She also said it would be really helpful if we offered the ability to resend certificates of compliance from the website; customers often misplace the ones we send with the order. She added that the ability to move stock from one warehouse to any of the other four – “like we used to be able to do” – or at least see all inventories, would be a big help when we’re low on stock in the primary or secondary warehouses. She likes the Live Chat feature.

## Danica Whorton – Customer Service

According to Danica, the company “runs itself.” There are three sales reps who are always on the road; they primarily sell inkjet printers and do their own quoting. Danica processes packaging orders and RFQs directly from their customers. Jim and Maggie demo’d print designer for her last year, but she still doesn’t use Laddawn for printed bags. She said our prices are high.

Danica happened to have a real “must ship today” order to put through so we observed her doing that. She pulled out a notebook with handwritten notes (4 stock lines) from a customer call earlier in the day. To begin she went to Quick Add and began entering numbers. Her system uses Laddawn part numbers with a “LAD” prefix. She stores items customers order all the time in her system. She has her Windows calculator open; after entering each item she calculates the per item price (with the one percent discount) and records it in her system. She placed the order with the must ship today flag.

We then asked Danica if she’d heard we recently started selling wipers. She had not heard and wasn’t really familiar with what they were. After a quick explanation, we asked her to price Industrial Medium Duty 8 ¾ x 17, 60 gsm wipers, as if a customer had requested them. She jotted down some notes about what to look for. We asked her what she would normally do in a situation like this; she said she might not know if it was something Hill Packaging would even source. She might Google it; she did pull out the catalog and explain that it was the easiest way to see if Laddawn carried something. When she turned to the website, she seemed to have no problem navigating through the widget to the right category. She did, however, click on the disabled width field several times – “is this supposed to be doing something?” – before opting to click Find. When she got results she scanned up and down a few times before setting on the right one.

We then moved on to a printing task – pricing a 9 x 12 x 2mil LD Wicketed Bottom Gusset bag; printed on two sides. You don’t have customer art. Before getting into it we briefly discussed their current printing business; they do all of it with Clearview.

She said her strategy in a situation like this (no art) would be to do multiple quotes with multiple art sizes/color counts, rather than try to guesstimate size/color count or bother the customer with a lot of followup questions; this would be a benefit of DIY quoting on Laddawn vs. what she is used to doing (dealing with three different people at Clearview).

She veered off script and pulled up a technical drawing for a Clearview job. She understood she couldn’t use the drawing in our designer, but wanted to see what it would be like to replicate this bag - a 3 x 7 x 4mil zip top with printing on both sides - in our designer. She began by doing a screen capture of the art on the front of the bag (combination of spot colors and gradients) and saving it to her computer. She navigated all the way through the widget to the print designer. She had no problem finding “Add Artwork”; she paused a bit before finding “Upload artwork.” After the upload, she paused at the apples. “I would not know what to do. …I would just try it out. I’ll try this.” She chose the gradient apple. “Oh, you can do both.” She realized she could choose more than one. She chose the spot color apple. When the art was placed she noticed the formatting popup and that we detected CMYK and colors. “That’s cool.” She then felt it was important to tweak the size of the screen capture art to match the dimensions in her drawing; she kept getting a red toaster error message. [This was definitely not a good experience; however, I am not sure if this is “working as designed” and had to do with the screen capture being slightly off, and the aspect ratio being locked.] [As I look at it again, I think this is what happened – the safety area in the Clearview drawing is slightly larger than what we allow. Also, in the default zoom the safety line wasn’t visible – at least it wasn’t while I was attempting to recreate the issue. So I think she was trying to expand the image to a slightly larger width that would fit within the safety lines of the Clearview bag, but not ours – and because no one could see the safety lines in that moment, this was not evident. The red toaster was correct; however, now after zooming in/out, and starting from scratch to recreate, I cannot get the safety lines to disappear. So while I may have recreated what happened on our visit, I cannot recreate it again. Put in a ticket - 45461 -to make the toaster message more helpful. 4/24/19]

She was frustrated that she could only *drag* the art to be the proper distance from the top; she thought that like dimensions, she should be able to type a value in, for the sake of precision. “I do see the blue [in the rulers].” She recognized that was her means of getting the art to the right position, but we all noticed that the blue shading in the ruler extended beyond the design area. [ACTION ITEM – This seems like a bug; test and open ticket if appropriate. Opened ticket – 45450 – 4/23/19]

She captured the art for the back of the bag from her Clearview drawing and saved it. She uploaded it and placed it on the second side of the bag in the designer. When she clicked Find she got the final color count modal; it stated she exceeded our limit of 8 colors. “I guess I am stuck.” We had to coach her to return to the designer. When she returned and selected art on one of the sides, she wondered aloud, “do I have to enter PMS colors?” What to do about the colors was not at all apparent – i.e., deleting some of the detected colors. We coached her to delete some – but deciding which ones felt a little arbitrary. She then tried Find again; her color count was still over eight. She returned to the print designer. We looked at the art on the second side (black text and bar code on white background); that had > 4 detected colors including shades of gray. She deleted all but the white and the black. She then did another Find but the color count, now at or below 8 was still higher than she thought it should be, so we returned to the designer again. We ended up coaching her on the white on the front and the white on the back being doubled counted, and that the way around this was to assign a PMS value. “I would Google that.” She Googled the PMS value for white; the answer wasn’t obvious. We coached her that “white” was the PMS value for white.

We finally executed a Find. She though the plate fees were reasonable, but the overall price seemed high and we didn’t offer a low enough minimum (40M v. Clearview’s 5M). She liked the online technical drawing. She added it to the cart. She clicked “Revise Artwork” and we returned to the print designer and her art was missing. [ACTION ITEM – test and open ticket if appropriate; I had her share the cart with me. Able to recreate consistently. Opened ticket. 4/24/19]

We continued chatting. She showed us a problem she’s having with customer part numbers on labels. It was really hard to follow but the gist of it is what’s checked (Laddawn/mine/my customer) isn’t necessarily what shows. [ACTION ITEM – I think there was more to it than this; need to test and open ticket as appropriate.]

She said had no idea that the ability to store shipping preferences existed until she stumbled upon it one day when she decided to set up an avatar image. “This is fricking great.” However, she showed us a problem with carrier and payment method; we prompt for carrier first, then payment method – filling in payment method wipes out what’s in carrier.

[ACTION ITEM – Investigate bug and open ticket. Opened ticket -45468 – 4/24/19. Aside from promoting preferences as a “hidden gem” we should consider checkboxes or something for saving these as preferences during checkout, the way we do for “special instructions.”]

She thinks the small buttons in the top right of the cart are not intuitive. She didn’t realize what they did till someone at Laddawn explained them.

She likes My Orders a lot. She likes the ability to filter on names and that it defaults to her orders. This is where we should provide access to C of Cs. She did not know that we recently enabled returns online. We encouraged her to explore; after clicking “Return” for one of her orders, she struggled with figuring out where to start. She thought clicking “Submit” would lead her to Q&A about the return. She then realized she had to open up the line (in the one-line order); she concluded it would be helpful if we defaulted to having the first line fully expanded. Then she filled out the return section and clicked Submit thinking that there would be another step, but this unintended test return went through. (Jeff notified CE to cancel.)