



**Publishers Survey:**

# The State of Production Automation and Workflow Modernization



## Publishers Survey: The State of Production Automation and Workflow Modernization

The publishing industry has undergone vast change in recent years. The dramatically expanding use of digital devices has created an expectation among consumers that content will be available to them on demand in multiple formats. At the same time, book and journal publishers have endured significant threats to their business models: The ubiquity of online content has made it more difficult for publishers to profit from their products, while new online-only competitors, unburdened by legacy print processes, have arrived to disrupt the status quo.

Publishers have responded by deploying automation technologies to modernize their workflows and production processes. Yet, according to the **Apex CoVantage Publishers Survey**, one thing is clear — for all they have done so far, publishers know much more work remains to be done.

The survey included a cross section of book and journal publishers, both large and small, from around the world. The picture that emerges from our research is that of an industry that recognizes where it needs to go, but often is struggling to find the right path.

In particular, our survey found that publishers:

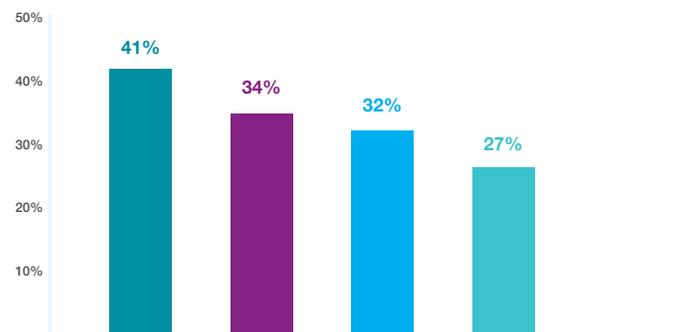
- Appreciate the substantial benefits to both them and their customers that derive from an XML-first workflow, which ideally begins immediately after the authoring stage and makes it easier and faster to publish output in multiple digital formats. Yet many have not yet adopted this approach.
- View increasing automation as a top priority, acknowledging the inefficiencies in their editorial and production processes. Yet many publishers have failed to acquire the technologies that would improve those processes, and many are unaware they exist.
- Recognize the need to speed their time to publication and reduce redundancies in their production processes to save time and money. However, they continue to struggle to overcome their challenges.

Join us as we examine publishers' responses to our survey in detail, offer our analysis and context, and make a few suggestions on how to improve your own situation.

## Part 1: Modern Publishers Face Evolving Challenges

A centuries-old industry constructed to deliver the printed word has been tasked, in recent years, with delivering eBooks, online content, mobile content, and more — in most cases still providing print, as well. So it comes as no surprise to us that, when asked to identify their greatest current production difficulties, publishers most commonly cite the need for better adaptability to meet the requirements of new eProducts:

### What are your greatest production challenges?



- **41%: Adaptability to meet new eProduct requirements**
- **34%: The need to make multiple passes**
- **32%: Redundancy in creating multiple formats**
- **27%: Quality of products**

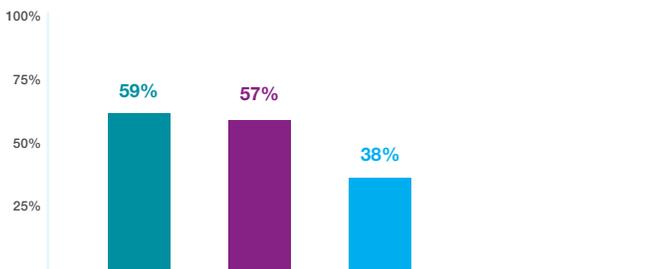




Solving these challenges requires a fundamental rethinking of what publishers do, according to a technology executive with a large book publisher who was among our respondents. “We have a lot of different electronic products — there are a lot of different channels that content from books may go into, and our book production process is still very much a book production process, not a content production process,” the executive said. “So now, we’re reimagining the entire process, where content is the output and a book is only one output and not necessarily the only or the first output.”

These challenges, in turn, contribute to delays in getting products online and on shelves. Nearly 6 in 10 journal publishers, for example, told us that getting final approval on a journal article takes at least two weeks.

### Journal publishing processes that take at least 14 days:



- **59%: Acceptance to publish**
- **57%: Peer review**
- **38%: Acceptance to first proof**

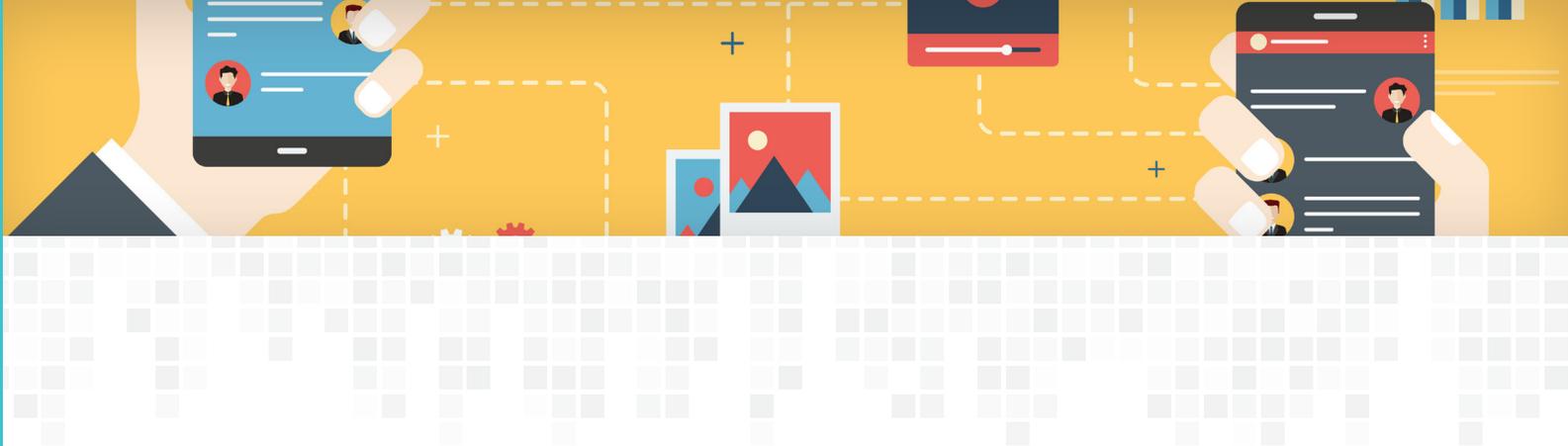
*“As a publisher, our big push is speed to market,” explained one survey respondent, a production manager at a large book publishing house. “The primary challenge is how to make things faster, faster, faster.”*

“As a publisher, our big push is speed to market,” explained one survey respondent, a production manager at a large book publishing house. “The primary challenge is how to make things faster, faster, faster.”

He said that while production times have been forced to accelerate at his company, the process has not gotten more efficient. As a result, quality has suffered. “I’ve worked here nearly 20 years and can think of only three instances prior to this year where we had to pull a product; this year alone I can think of nine, and only one of those was not related to production.”

Another challenge lies in getting authors to follow guidelines when it comes to submitting manuscripts. Some 53 percent of respondents said that author compliance is a problem — and Apex Vice President and Principal Consultant Bill Kasdorf suspects that number may be artificially low. In an effort to keep their authors happy, he said, “a lot of publishers have really minimal requirements for authors, which means it is easy for authors to comply.”

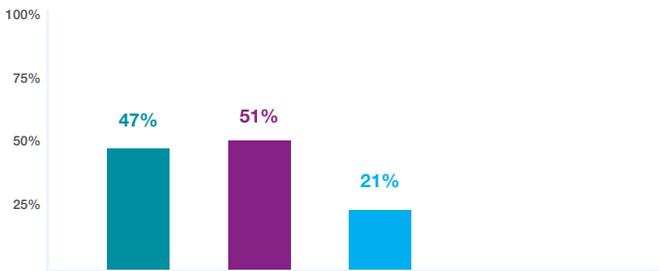




Of course, that only creates more work for production employees — especially with images. Of those experiencing submission difficulties, 51 percent cited incorrectly submitted images as a “particular headache,” which leads to delays and quality issues.

“They would just take whatever the author provided — 72 dpi screen grabs, or things created in Microsoft Paint — and say, ‘Oh yeah, we’ll take that,’ and then pass it to production,” the production manager told us. “And then we have to go back to the author and get it fixed, or just publish it that way.”

**Do you have issues acquiring manuscripts and graphics according to your outlined manuscript submission process?**



- 47%: No
- 51%: Yes, images are a headache
- 21%: Yes, manuscripts are a headache

Technology provides a solution here. Apex, for example, offers a tool that authors can use to check their images against publishers’ specifications. It’s easy for authors to upload artwork into the tool, which most often can simply correct the image without further action by the author. Yet only 18 percent of responding publishers use such a tool.

**Do you use a preflight image-checking tool as part of your submission process?**



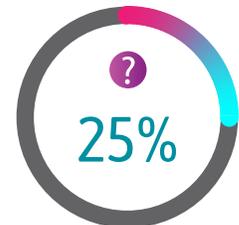
Yes



No, but I’d be very interested in a tool to do that

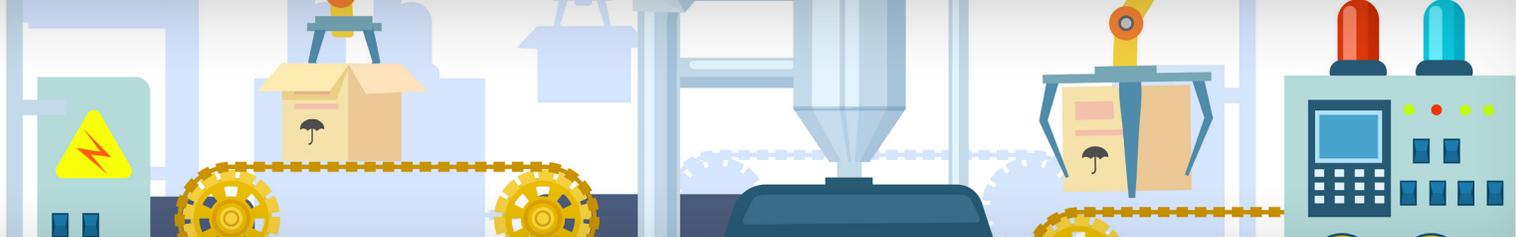


No, I don’t see a need for it



I’m not sure what a preflight image-checking tool would do





## Part 2: The Automation Situation

About half of publishers have implemented some form of automation technology for their editorial processes; 64 percent have done so for their print production processes and 71 percent for their electronic products production. The most popular automation tool in each case was in-house software.

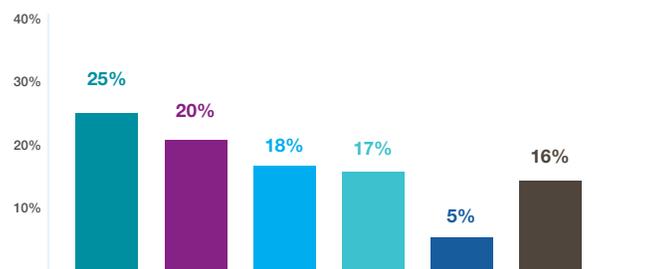
**Are you currently using an automation tool for the following parts of your publication workflow?**

Workflow Step	Yes	No
Editorial	51%	49%
Print production	64%	36%
e-Products production	71%	29%

Almost two out of three respondents said they're satisfied with the production automation systems they're currently using. Nevertheless, although their current systems seem to work okay, they aren't doing enough: more than two-thirds (71 percent) intend to implement more automation in the next six months, across a range of areas.

This widespread adoption of automation is hard to square with the level of frustration that respondents described with production processes. One possible explanation: Publishers added automation technology without really changing their workflow, meaning production staff continues to perform all the same tasks with the same number of handoffs, just with different tools.

## What automation advancements are you looking to implement over the next 6 – 18 months?



- 25%: Production tracking
- 20%: Manuscript management
- 18%: Content management integration
- 17%: Production software
- 5%: Syndication tools
- 16%: None

Publishers say that an important goal in using such tools is to improve rates of first-proof acceptance for both journals and books, to save time, reduce costs, and grow revenue.





**Publishers are working toward better first-proof acceptance rates:**

# Proofs	Journals	Books
1-2	68%	38%
3+	33%	63%

The automation technologies already exist. Apex’s ProTrak, for example, offers a comprehensive method of managing every handoff point in a publisher’s production process. And its Global Editorial Management System (GEMS) makes it easy for editors and other leaders to manage and view the entire content creation process, from task assignment to final payment to a freelancer.

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But, as the technology executive at a large publishing company told us, the challenge of implementation is more of a human than technical one. People become attached to their preferred way of doing things; it can be difficult to introduce newly automated systems simply because they’re new, even if they’re better. Automation also often means reducing the range of choices people can make in creating products, he said. Ideally, automation ought to make it easier for people to do their jobs, and not prevent them from creating the best possible products.

“We do a lot of different types of books, and there’s a tremendous degree of variability between the different types,” he explained. At his publishing house, the goal is to increase the degree of automation by developing a menu of templates from which editors and designers will choose. This will limit the editors’ ability to individualize their products without eliminating creativity altogether.

### Part 3: XML-First Workflows: Proven Benefits

The many benefits of an XML-first workflow are well-known to publishers: 63 percent of those who’ve implemented one describe it as the most important thing they’ve done for their production process. Indeed, the large-publisher production manager told us that introducing XML-first is the most important change he’d make to his process, if he had the power to act unilaterally.

63 percent of publishers who’ve implemented an XML-first workflow describe it as the most important thing they’ve done for their production process.

“That’s because of two things,” he said. “It starts the validation process [earlier]. And it’s important to get the validation process done as early as possible because if you encounter problems, you need to get them fixed. [XML-first] also changes the expectations of how we work with the author. We have to control the experience with the author during the production process. It has to be ours. And you can’t do that efficiently without XML-first.”

Likewise, the technology executive cited a whole range of benefits flowing from a process that’s XML-first, or at least XML-earlier.





“A lot of it is around enriching the content for those electronic products. But once we have the text as recognizable text and structured data, and not just words in a Microsoft Word document, we can start doing things to enrich that text — to bounce it off different databases, to extract links, and categorize it to different taxonomies. And we can pass it through processes that look for common errors that will automate, to a degree, the copyediting process,” he said. XML-first can also make designers’ lives easier by simplifying and automating page-layout tasks.

**Proven benefits of automation in publishing production:**



Streamlined workflows



Improved quality



Accelerated time to publication



Enhanced ability to address changing market demands



Lowered cost

**Conclusion:**

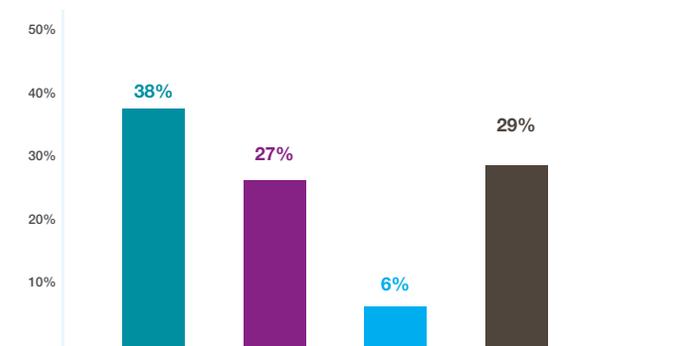
**The Publishing Industry’s Transition Is Only Beginning**

Publishers have surmounted a great number of challenges in recent years. Once producers of books, journals, and other printed products, today they create adaptable multiplatform content. Given the size of the change, the progress they’ve made already has been remarkable.

However, our survey makes clear that they’re only partway through that transition.

The good news is that the technology tools needed to help have been developed. Many publishers have built their own, with varying degrees of success; and for those that have not, customizable off-the-shelf tools are **available now**.

**Are you using an XML-first workflow?**



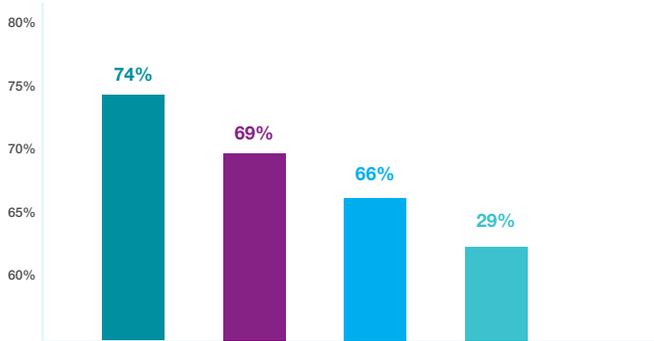
- 38%: Yes
- 27%: No, but we are looking into it
- 6%: We are in the process of migrating now
- 29%: No, and we have no plans to change





The bottom line, as Apex's Kasdorf sees it? "I'm actually pleased to see this much XML-first implementation.

**Publishers' highest priority goals are:**



- **74%: Revenue**
- **69%: Improving efficiency**
- **66%: Reducing costs**
- **29%: Improving author acquisition and satisfaction**

"XML-first used to be like taking your vitamins — you were convinced it should be good for you, but you didn't really know why," Kasdorf explained. "Now, we know why. Publishers are seeing concrete benefits from having both well-structured content and workflows. Not only are they gaining the traditional triad — faster, better, cheaper (yes, all three, not 'pick two') — but they're becoming more agile, more able to respond to the continually changing demands of the marketplace."

**Want to know more about the data and see how Apex can assist you with content and workflow improvement?  
Get in touch.**



About Apex CoVantage

Apex is a leading supplier of data conversion, editorial, and content-enhancement services to publishers worldwide. By balancing leading technology and broad industry expertise, Apex delivers exceptional content and media solutions to its customers. Apex has been managing large-scale digitization projects for libraries, publishers, and media companies around the world for nearly 30 years.

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