

JCPenney Calls on Quark to Mastermind Migration to QuarkXPress 6.5

When the stalwart retailer JCPenney decided to migrate its advertising division to Mac OS® X, the company charged Quark with analyzing its workflow, proving the value of QuarkXPress® 6.5, installing the software, and training the users. All this had to be accomplished without interrupting the publishing workflow — at all. Showcasing the efforts of Quark, project manager Craig Lanning worked with JCPenney's IT staff to achieve what Lanning calls, "The most extraordinarily smooth migration I've ever been involved in."

— Kelly Kordes Anton

Quark faced a significant number of users who needed to learn Mac OS X, FontBook, and QuarkXPress 6.5, while maintaining production on the store's retail preprints, direct mailers, newspaper ROP ads, in-store graphics and collateral, how-to publications for promotional events, and more. To get an idea of the project's scope — and what was at stake — take a look at the impressive numbers involved.

- 175 QuarkXPress users, averaging 10 years of experience with the software
- 6,000 pieces produced in QuarkXPress since adopting the software in 1989
- 5 weeks planned for the migration; group trainings planned for 3 days per week
- \$800,000 or more in savings predicted by Quark once all workflow enhancements are complete
- JCPenney®, founded in 1902, has 1,017 stores nationwide, employs 143,000 people, and has an annual revenue around \$18 billion

Michelle McMillan, JCPenney systems manager, credits Quark with not only the successful migration to a new publishing environment, but also with opening up new creative and workflow opportunities to the company's designers. "By partnering with JCPenney on this migration, Quark has helped us complete our goals of moving from an OS 9 to an OS X environment, as well as bringing more stability and education to our user community," says McMillan. "These changes will help users save time and apply more creativity to ads and collateral that support our store, catalog, and Internet businesses."

The Proposal

Despite its 15-year history with Quark, JCPenney was researching "other options" when it started plans to migrate to Mac OS X, but when Quark came in with a detailed plan encompassing not only new software but integration and workflow analysis, the company accepted.

"Essentially, the migration would consist of workflow analysis, a week of installation and testing of initial images, and training in the morning while machines were getting software," says Lanning. "When they went back to their desks, they faced all new software, so trainers would then be available in the afternoon to answer questions." JCPenney also negotiated for an on-site technician to handle all publishing concerns.

JCPenney's initial goal was to simply move all employees to Mac OS X, says McMillan. "In phase one, our primary goal was to train and migrate approximately 175 users to Mac OS X and QuarkXPress 6.5 in a three-days-per-week window over a five-week period, with minimal disruptions or downtime." Therefore, the initial plan involved no workflow changes or new features. The ultimate goal of the Mac OS X migration, however, is still workflow enhancements. "We want to allow the creative teams to take advantage of new creative and productivity opportunities — to help them do their jobs much easier," adds McMillan.

The Process

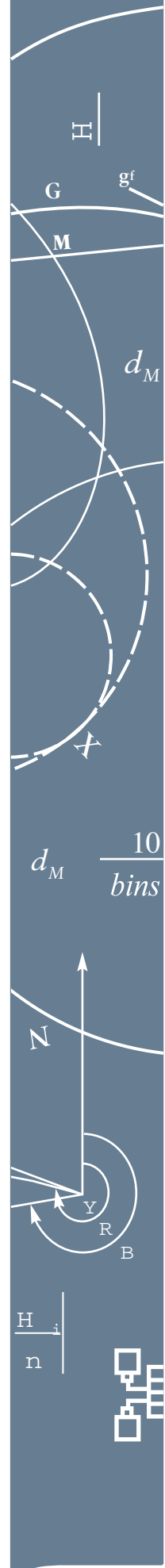
Quark and JCPenney put together project teams to handle the implementation, resulting in what Lanning calls an "expertly coordinated effort." Because few new features were introduced, training focused on Mac OS X navigation, specific changes to QuarkXPress since version 4.11, and other applications. Quark® License Administrator (QLA) was also introduced without a hitch, including distributing licenses to off-site users in Puerto Rico.

"Training the users on what was to change in their daily tasks helped give them a good start," says McMillan. "Some of those tasks included navigating around their desktop, connecting to servers, creating PDFs through QuarkXPress, managing fonts, and becoming familiar with a new mail program."

"Setting up the initial training to incorporate the basics of each program was a key element. Our morning sessions consisted of training performed by Quark specialists and JCPenney personnel. Users attended class while their hard drives were changed out. In the afternoon, Quark trainers assisted with one-on-one follow-up."

Despite the emphasis on limiting new features, JCPenney did take two suggestions from Quark. Working together, the JCPenney and Quark implementation team produced specifications for exporting consistent PDFs to use for soft proofing, replacing an old, hard-copy, mail-based process. In addition, they started using layers for commenting within QuarkXPress layouts, simply hiding the layer when they didn't want to view or print the comments.

"The planning and execution of this migration with Quark has been a great partnership," says McMillan. "Users were really pleased."





Planning the Next Steps

With phase one, (the migration to Mac OS X) completed in April 2005, JCPenney is looking forward to phases two and three. Phase two will encompass workflow enhancements.

“As part of the planning process prior to the migration, JCPenney and Quark conducted workflow interviews,” describes McMillan. “QuarkXPress features that would benefit us the most were presented to a committee, which then prioritized the list for a phase-two rollout of more training and anticipated process changes.”

Phase two enhancements will include a more extensive use of libraries, more controlled use of style sheets, further application of the print styles features, and the implementation of layers for localization in future Spanish and English publications. During this process, training will focus on consistency so all users learn the same processes at the same time. It is these simple changes that Quark believes can save JCPenney more than \$800,000 per year.

Phase three of JCPenney's plan is the implementation of QuarkXPress 7. Just think what the future holds for JCPenney when job tickets and transparency are introduced...

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