FIELD NOTES

BY KOBLE SYSTEMS

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IN THIS ISSUE:

Getting More from EBMS, by Brian Esh
Leadership Under Pressure, by Rodney Smoker
When “Doing More” Starts Working Against You, by Luke Jankovic

A NOTE FROM MIKE

Hello customers and friends!

Given that many of you are ramping up into your busy season, I want to walk through what it can look like to honor each other in the (often hectic) flow of day-to-day operations.

At Koble, "honor each other" is one of our core values. Our work is for people, so this means doing our work with the intent to bless people through our efforts. The people we serve aren't just customers, but also employees, vendors, partners – really anyone who is impacted by our work. Serving others takes intentional hard work, and so we want to see employees at Koble rising to that challenge and doing the hard work to bless the customer (and be helpful to colleagues in the process).

As humans, we enjoy a predictable rhythm in life, and work is no exception to this. When we built that process two years ago to smooth out the flow of materials through production, it really was the "bee's knees." So why think about changing it? We can easily overestimate what we know, and our confidence level in that knowledge is often higher than it ought to be. Rarely do we find a situation where there's no room for improvement. So when we look at that process, rather than intuitively saying to ourselves "It's good, I don't need to think about that", we can borrow from the LEAN framework and say "that process represents the current best way we know to do it". What this allows for is both the confidence that is in fact good today (to the best of our knowledge), while recognizing that we may find a better way to do it tomorrow. And when we do, we ought to make the changes necessary to implement that improvement.

So, by "honor each other", we also want to execute on great ideas. We want to learn and grow together, and this learning best takes place in the thick of the work. We may not want to implement major changes that require production to shut down during our busiest time. But I would suspect that most process improvements aren't at that scale and can be executed on right away, allowing you to harvest the benefit sooner and avoid creating a backlog of "good ideas to work on later" – we all know where that list goes! Create clarity now and allow employees to improve their work methods as the need and inspiration arise. In doing this, you are showing respect. And who knows, they might even accomplish more than anyone thought possible.

Here's to honoring each other in the work and making good things happen for others in the thick of busy season. There will be time for more vacation (and sleep) later.

Please reach out if we can help.



MIKE STOLTZFUS
KOBLE CEO



Contents

04.
GETTING MORE FROM EBMS
Practical things to implement ahead of busy season.

06.
LEADERSHIP UNDER PRESSURE
How to help your team stay grounded when workloads spike.

10.
WHEN "DOING MORE" STARTS WORKING AGAINST YOU
Why focus and disciplined limits lead to better outcomes than endless optimization.

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The first 10 respondents will receive a $10 Chick-Fil-A gift card!

PRACTICAL WAYS TO GET MORE FROM EBMS WHEN BUSY SEASON HITS

BY BRIAN ESH,
DIRECTOR OF IMPLEMENTATIONS

When order volume climbs, phones ring nonstop, and everyone is feeling the pressure of the high-demand season, you don't want unnecessary complexities slowing you down. A field that's buried three tabs deep. Multi-layered reporting processes that keep you at your desk longer than you have time for. Inventory decisions based on gut feel instead of real usage. What may feel like "no big deal" in a slower month suddenly turns into friction that slows the whole operation down.

Here are three practical ways teams use EBMS to remove bottlenecks and keep work moving smoothly during busy seasons.

#1: Using Customization Designer to put key fields where they're most handy.

Many workflow slowdowns aren't caused by missing information. They're caused by information that exists, but a few too many clicks deep.

Customization Designer gives you the ability to add custom fields, move standard fields into more useful locations, and surface critical details directly on the screens your team uses every day. That might sound small, but during a busy season, it makes a noticeable difference.

Consider a shop juggling dozens of open jobs at once. A service coordinator may need to know equipment details, warranty status, or special handling notes every time they open a work order. If that information lives on another tab, it adds friction to every interaction. By moving those fields directly onto the main service order screen, the coordinator gets what they need quickly, without breaking focus or slowing down their process.

Or take a manufacturer handling a surge of custom or made-to-order work. Sales may capture important build notes or options during order entry, but if those details aren't obvious to production, mistakes and rework follow. Adding a custom field and placing it front and center on the order ensures that information flows cleanly from sales to the shop floor, even when everyone is moving fast.

Changes like those don't overhaul your workflow. They simply reduce the number of clicks and interruptions that add up over the course of a busy day.

Getting Started

Before getting started with Customization Designer, you want to ask a simple question: What information does our team need most often, and where do they expect to see it? From there, you can either add a new custom field or move an existing EBMS field into a more visible location.

For further detail on how to set up customization designer, visit koblesystems.com/knowledge or scan the QR code.

#2: Using PowerBI reporting dashboards to gain daily insights

If you have someone running reports, exporting data, reformatting it, and then sending the numbers around, by the time that information is seen and digestible, the situation has already changed.

Reporting dashboards built with Power BI flip that model. Instead of looking backward, teams get real-time visibility into what's happening right now, using data that flows directly from EBMS.

In a manufacturing environment, dashboards can reveal where work is piling up. A growing backlog at a specific work center or a spike in work-in-process inventory can signal the need to shift labor or adjust schedules before delays cascade through the operation.

Leadership and finance teams can use their own custom dashboards during busy billing cycles, showing sales trends or accounts receivable aging to help spot issues early without needing to pull reports manually.

How to Set it Up

Power BI dashboards in EBMS are run through the SQL Mirror module, which creates a live, read-only copy of selected EBMS data in a Microsoft SQL Server environment. Any changes made in EBMS are reflected in the mirror within seconds, making it ideal for real-time reporting.

Many teams start with pre-built dashboards (we offer quite a few through our Koble Analytics product) and then refine them or add custom ones over time. The goal isn't to track everything at once, but to surface the few metrics that matter most during busy seasons, so teams can spot issues early and adjust before small problems turn into fire drills.

Visit our online knowledge base to learn more about using SQL Mirror for PowerBI reporting, or ask your Account Manager about Koble Analytics.

#3: Using stock level settings to avoid shortages or overbuying

Inventory purchasing is one of the first places bottlenecks show up during busy seasons. Demand increases, lead times stretch, and you as the buyer are forced into reactive mode. Because of this, decisions are based on what feels urgent instead of what's actually needed.

EBMS stock level settings help remove that guesswork. By defining minimums, maximums, and reorder points, the system can calculate purchasing needs based on real usage and demand patterns and not just assumptions.

A parts distributor may see dozens of items moving faster than usual during peak periods. Instead of fielding constant "we're out" messages, buyers can rely on EBMS purchasing recommendations to prioritize what needs attention now and what can wait.

Setting it Up in EBMS

For teams just getting started, stock levels can be entered manually — setting minimums, maximums, and reorder points based on experience. But EBMS also includes tools that calculate these values automatically using actual sales or purchase history.

For businesses with more complex or seasonal inventory patterns, advanced inventory tools can further automate this process by forecasting demand and updating stock levels over time.

Most teams begin by running calculations on a limited group of high-volume or high-risk items. From there, they refine settings as they see how the system behaves during real-world demand spikes.

For detailed setup instructions, scan the QR code or visit the knowledge base at koblesystems.com/knowledge

Busy seasons reward preparation

EBMS is built to adapt to the realities of growing, inventory-driven businesses. Customizing screens, surfacing the right data, and letting the system handle routine calculations all help remove friction when workloads spike.

Removing bottlenecks isn't just about efficiency. It's about honoring your team's time and focus when they're under pressure. A few thoughtful adjustments now can make the next busy season feel far more manageable.

Have questions about these EBMS features or want to learn more ways to leverage EBMS this busy season?

Reach out to your Account Manager.

LEADERSHIP UNDER PRESSURE

HOW TO KEEP YOUR TEAM GROUNDED WHEN WORKLOADS SPIKE

When work piles up, most leaders do what they think good leaders are supposed to do: they push harder, jump in to fix things, stay later, and tell their teams to hang on, just a little longer.

I understand that instinct. It usually comes from a place of care, not control. But after years of working with business owners and management teams through high-pressure seasons, I've learned something important: most teams don't lose their footing because the work itself is too much. They lose their footing because confusion, friction, and misalignment quietly pile up until everything feels urgent and nothing feels clear.

Helping a team stay grounded during busy seasons isn't about pushing people harder or jumping into everything ourselves. It's about diagnosing what's really happening, removing the roadblocks in our team's way, and giving them the clarity, tools, and autonomy they need to keep moving.

Diagnose Before You React

Not every spike in workload means the same thing. Sometimes it's seasonal. Sometimes it's a growth issue. Sometimes it's a people problem. Sometimes it's a systems problem. And more often than not, it's a mix of all of the above. If you don't take the time to understand what's actually driving the pressure, you end up solving the wrong problem.

When I sit down with leaders, I usually start with a few basic questions:

- What is actually breaking down right now?
- Where are people getting stuck?
- Is this a volume problem, or a clarity problem?
- If this keeps happening, what will it cost us long-term?



This step alone can change the emotional temperature of a team. When leaders slow down long enough to name what's really happening, they stop reacting to symptoms and start addressing causes.

Remove Internal Friction First

It's easy to assume that our teams are overwhelmed because there's too much work. But often, that's not actually the case. They're overwhelmed because the work doesn't flow.

I've worked with teams where capable, motivated people were falling behind, not because they got lazy, but because everything required approval, clarification, or sign-off from someone else before it could really get done.

In one situation, a company needed to hire a new manager to help relieve pressure in a specific department. It was assumed that it would take nearly a year before that person could truly contribute.

But when we stepped back and mapped out what that role actually needed to do—and what it didn't—the picture changed. The job wasn't about knowing how everything in the business operated. It was about mastering a few critical workflows. With the right tools, training, and boundaries, that person could be productive in weeks, not months. In the end, it wasn't about the individual's capacity to do the work, but rather an over-assumption of what they needed to do the job well.

This happens more than most leaders realize. We unintentionally slow people down by over-defining, over-approving, and over-protecting. It usually comes from good intentions: wanting quality, consistency, and control, but the end result is friction.

In order to set our people up for success, we need to remove drag.

- Where are we unintentionally slowing things down?
- What assumptions are we making about what people can or can't handle?
- What would move faster if we simplified the process?



Give Clarity and Autonomy To Your Team

I once worked with an equipment company that was struggling to bring structure to their service department. Their problem wasn't a lack of demand. It was the opposite. Requests were coming in from all directions—residential users, small contractors, and large industrial clients. And because they wanted to be helpful, they said yes to all of it. Custom configurations. Rush orders. Nonstandard parts. Special exceptions. From the outside, it looked like growth, but from the inside, it was chaos.

The service team never knew what kind of job was coming next or what to prioritize. The purchasing manager couldn't easily predict what parts they'd need. Sales kept promising things that operations struggled to deliver. Everyone was working hard, but no one felt like they were winning.

When we stepped back, the real issue became clear: they had never clearly defined who they were actually built to serve.

So that was our goal: clarify who the ideal customer is. What type of client could they serve well, consistently, and profitably? With

that defined, everything changed. They standardized what kind of work gets prioritized, they simplified how they quoted, and they set boundaries around what they would and wouldn't service. They trained their team around a clearer set of expectations.

The workload didn't magically disappear, but the work became predictable. The team knew what winning looked like. They knew where to focus. And they knew when it was okay to say no.

The most grounding thing a leader can do for their team is create clarity. When people know their lane, they move. When they don't, they hesitate, double-check, wait, and worry about getting it wrong.

Learn From Your Busy Seasons

Most of the time, busy seasons aren't surprises. Some companies have a specific two- or three-month window that account for the majority of their annual revenue. Everyone knows it's coming. And yet, every year, the team still braces themselves like it's an emergency.

Where I often see the turning point in this type of situation is when a company finally treats that season not as a crisis, but as a pattern. For example, instead of burning out the core team every year, build a small group of seasonal workers and adjust onboarding so those workers can contribute quickly. Plan production schedules further in advance. Communicate clearly with customers about realistic timelines during that window. Nothing about the season will actually change, but everything about how it feels does.

Your team will stop panicking and working in constant triage mode. They'll know what's coming, what support will be added, and what "normal" looks like for that season.

It's only when we shift our focus and look for the areas of opportunity each busy season brings that we're able to make things better.

- Where your systems are thin?
- Where clarity is missing?
- Where does too much depend on too few people?
- Where has training fallen behind growth?

Key Takeaway

The way your team experiences busy, high pressure seasons is largely shaped by the systems, boundaries, and expectations you put in place. I've learned that leadership is about choosing clarity over urgency, simplicity over complexity, and trust over control.

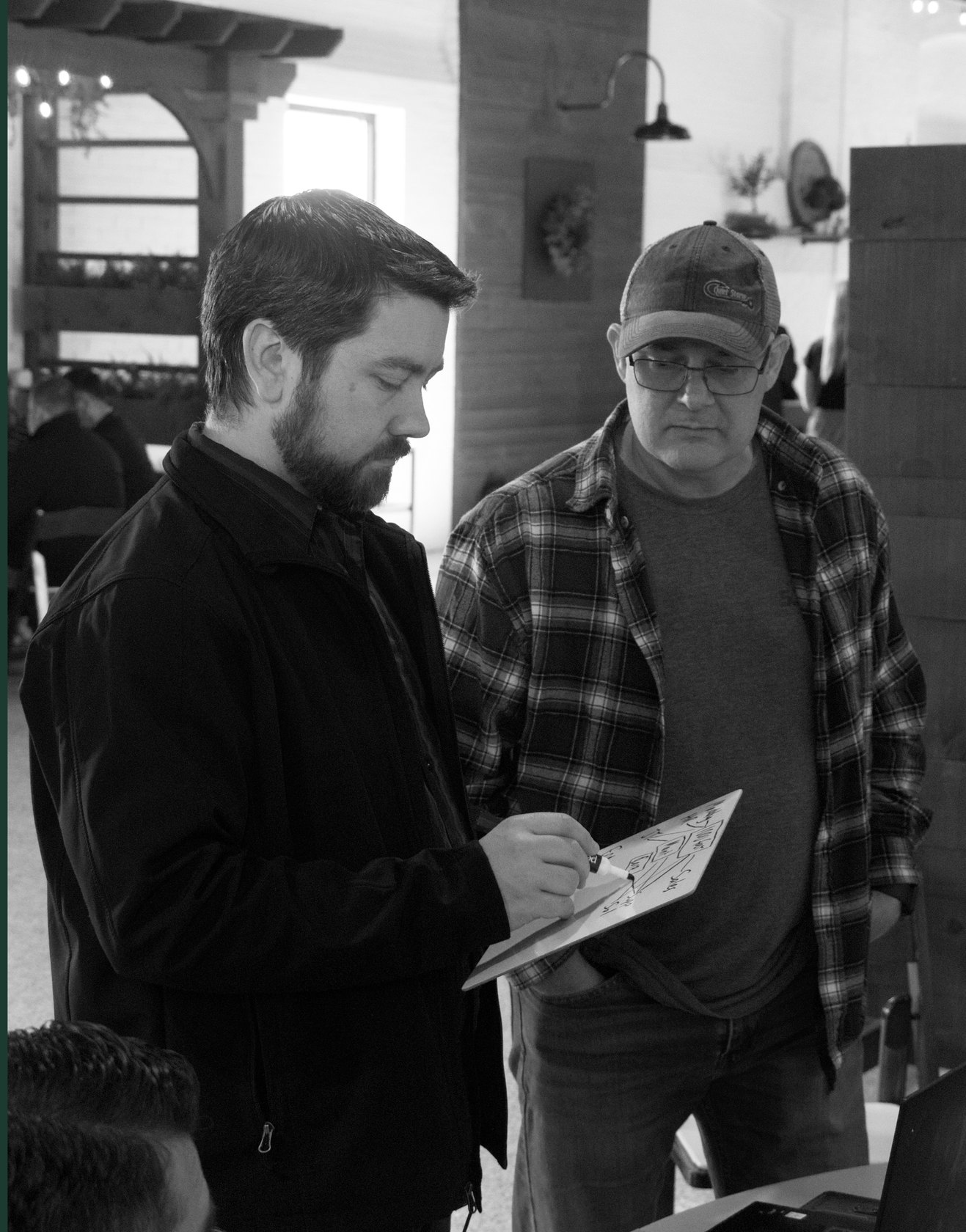
When we remove the obstacles that don't need to be there, when we give people clear lanes instead of constant direction, and when we treat busy seasons as patterns to learn from instead of crises to survive, we build an environment where people can handle it without losing their footing.

So take a moment and think about your own business. Where does work feel heavier than it needs to be? Where are people guessing instead of moving? Where could a little more clarity replace a lot of stress?

Start there. One thoughtful change can shift an entire season.

RODNEY SMOKER
EXECUTIVE BUSINESS CONSULTANT
& ADVISOR

If you and your team are feeling pressure without clarity,
Rodney can help you diagnose what's really going on.
Connect with Rodney directly at rodney@koblesystems.com



WHEN "DOING MORE" STARTS WORKING AGAINST YOU

BY LUKE JANKOVIC,
KOBLE COO

We have reached the point in the year when people start to realize that they may have bitten off more than they can chew. Bold new year's ambitions have been reduced to lists of started but not yet finished projects and initiatives. And as the reality of actual capacity meets those lists of aspirations committed to, something has to break.

The common response to this is to try and build new systems that will optimize the work. We think to ourselves, "if only we had an ideal process" — then we could figure out how to stuff all the things we want to do into any given sequence of 24-hour periods. This is why so many new whiz-bang AI tools are being marketed today. The promise is to somehow fit it all in (even though that's never worked in the past).



Let's call this the optimization trap. Instead of being honest about what's realistic and deciding to do fewer things well, we spend so much organizational time and energy "optimizing" to try and keep everything going. But more often than not, we end up not doing much of anything well.

Identifying the Key Constraint

When we think about how to effectively improve the way we deliver value to our customers, we need to consider the theory of constraints, outlined by Eliyahu Goldratt in his book, *The Goal*. It's a simple but profound way of viewing any system. The basic gist of this theory is that the output of any system is capped by its "limiting constraint." There may be several constraints, but the limiting constraint is the key bottleneck that governs the output of the whole system. And, critically, any improvement in the system that doesn't expand the limiting constraint only makes things worse. Once an organization resolves the key limiting constraint, they can move on to the next limiting constraint, and so on.

> At Koble, we are intentionally leaning into this principle in 2026 by changing our work methods. We are working to methodically do fewer things at one time and focusing our attention on key bottlenecks.

Today, our limiting constraint is our software release process. We consistently build new features for EBMS, designed to make it more stable, more reliable, and easier to use, but at the moment, all of that gets stuck between the engineers having completed the work, and it being confidently installed on our customer's instances of EBMS.



So, we are limiting our new work in progress as a company until we resolve our release process. We'll know we've succeeded in removing this limiting constraint when our customers can confidently install a new version of EBMS at regular intervals to get access to new features.

> We believe that our ability to help our customers scale with effective systems is to embody doing so ourselves.

What is Your Limiting Constraint?

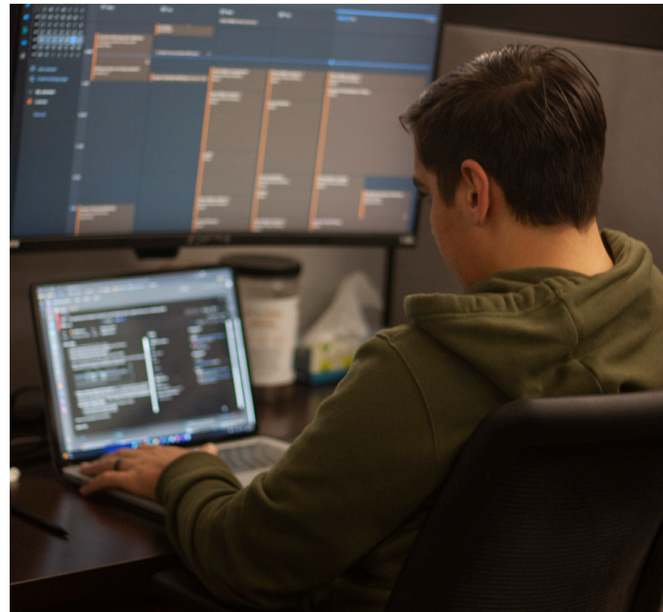
If any of these ideas resonated with you, here are a couple guiding questions to consider for your business—the same ones we've been asking ourselves here.

First, are there areas in your business where you sense you are falling into the optimization trap? If so, my advice is to apply the 80/20 rule and ask which 20% of the work that you are optimizing will create 80% of the value for your customers? Keep that 20% and be disciplined to get it done before adding more to the list. Also, put the remaining 80% in a proverbial filing cabinet to review later.

Second, do you know what the limiting constraint in your business is today? If so, focus on solving it and limit your work in progress until you have. If you don't know what it is, look for areas in your business where there is build-up of inventory or capacity. You will find your limiting constraint nearby.

And, if you want to discuss this, or any other way we can help you here at Koble, feel free to reach out to me directly. I would love to chat.

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Koble

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WHEN EVERYTHING FEELS URGENT, CLARITY MATTERS MOST.

Inside: practical ways to get more from EBMS, how leaders keep teams grounded under pressure, and why doing less (on purpose) often leads to better outcomes.