

Headquarters

U.S.

Libbey Industrial Parkway
Weymouth, MA 02189
USA
+1 781 616 2100
info@infotrends.com

Europe

Sceptre House
7-9 Castle Street
Luton, Beds LU1 3AJ
United Kingdom
+44 1582 400120
euro.info@infotrends.com

Japan

Hiroo Office Building
1-3-18 Hiroo Shibuya-ku
Tokyo 150-0012
Japan
+81 3 5475 2663
info@infotrends.co.jp

InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. Additional information about InfoTrends is available on the Web at www.infotrends.com.

The Document Outsourcing Evolution - A Vertical Market Analysis

The dynamics of the document outsourcing market are changing dramatically. Service providers are disrupting longtime business models by blending environments and expanding offerings. They are becoming savvier business partners capable of delivering a broad range of services beyond print.

The missing ingredient that outsourcing providers desperately seek is an in-depth view of how clients are responding to these changes. This multi-client study will assess the effectiveness of the outsourcing market changes by probing decision makers within major vertical industries.

This study will:

- Investigate and quantify the vertical markets and corporate functions that are outsourcing document services.
- Gain an understanding of consumer behavior and preferences, identifying requirements, expectations, outsourcing trends, and purchase plans for outsourcing.
- Identify whom clients buy from (by vertical and business function) and the criteria used for selecting these providers.



Prospectus

Who Should Subscribe?

Senior Executives, Services Planners, and Marketing Executives at:

- *Equipment Manufacturers who serve the printing industry and maintain robust service organizations*
- *Facilities Management companies*
- *Quick Printers/Franchises*
- *Office Supplies Superstores*
- *Commercial Printers / Specialty Printers*
- *Statement Printers*
- *Document Services providers*
- *Print Brokers*
- *Data Service Bureaus*
- *Document Process Outsourcing (DPO) providers*

Corporate Executives, Document Owners, and Print Buyers who are:

- *Seeking information on the opportunities presented from outsourcing critical documents and document-intensive workflows*
- *Looking to understand what peers are doing within the industry*

Introduction

Across the document outsourcing market, seismic changes are occurring in the way that service providers go to market. Many providers have evolved from being viewed simply as “vendors” or “print providers” into savvy, business-process-focused partners capable of delivering a broad range of services beyond print. They have cultivated a comprehensive knowledge of their customers’ business challenges and understand how to leverage that knowledge to enable greater ROI for their customers.

Core to this understanding is vertical market expertise, with specific focus on the clients’ documents and document-intensive workflows. Industry expertise forms the foundation for outsourcing providers to move up the evolving document services spectrum – from the highly competitive (and commoditized) “spec and bid” provider to one that delivers value-added services and document process outsourcing capabilities.

For service providers, the key message from the marketplace is “integrate!”—but the challenge is how to implement it. Service providers must offer value-added services and best-of-breed solutions that seamlessly integrate with the customer’s business. The challenge is determining what services are required within each industry and how these services should be structured.

From the clients’ perspective, the challenges are equally complex. Organizations are increasingly looking at document outsourcing as a strategic opportunity to reduce costs and become more efficient. The savings and efficiencies delivered through traditional document services, however, are no longer sufficient. Clients find they lack the fundamental knowledge and insight required to make informed decisions about what to outsource, how to outsource, what providers they should consider, and how to make informed decisions.

The Document Outsourcing Evolution - A Vertical Market Analysis looks beyond market size and growth potential to understand the “who, what, when, how, and why” of the Document Outsourcing business within the major vertical industries. This study will survey corporate executives, outsourcing decision makers, document owners, and print buyers across multiple vertical industries in North America to create a detailed profile of document outsourcing within in each market.

Prospectus

Project Objectives

This study will profile the document outsourcing requirements and trends within the specific vertical industries. The results of this effort will answer planning and positioning questions required by document outsourcing providers and corporate clients alike. The objectives of this study are the following:

Investigate and quantify the vertical markets and corporate functions that are outsourcing document services.

Vertical industries that will be covered include:

- Financial Services
- Insurance
- Healthcare
- Manufacturing
- Retail/Wholesale
- Telecom and Utilities
- Legal

Gain an understanding of consumer behavior and preferences, identifying requirements, expectations, and purchase plans for outsourcing.

- What industries are most likely to outsource?
- What functional departments within corporations are outsourcing?
- What are the key document applications and processes being outsourced today? What will they not outsource?
- What are primary selection criteria for outsourcing service providers? What specific domain expertise is valued?
- Who are the corporate and functional decision makers?
- What size of organization (revenue) is most likely to outsource?
- How are contracts being structured today? What levels of shared risks are included?
- What is the typical annual value of a document outsourcing contract?
- What are the top reasons for outsourcing? What are the reasons for not renewing a contract or relationship?
- What are some of the major successes within each industry?
- What technologies and tools do clients view as critical to measure, monitor, and manage outsourcing performance?
- How much are companies planning on spending on document outsourcing? In what areas?

Prospectus

Identify whom clients buy from (by vertical and business function) and the criteria used for selecting these providers.

- Who are companies buying document outsourcing services from today?
- What selection criteria are most important within each vertical industry?
- Do clients prefer companies that specialize or have a broad range of services?
- How important are global capabilities in the decision making process?
- What benefits of outsourcing are being realized by clients in specific markets?

Market Research

Web-based Surveys

InfoTrends will conduct Web-based surveys of executives and decision makers within the major vertical industries to assess strategic direction for these operations relative to document outsourcing. Attitudes towards outsourcing, required provider capabilities, and planned investments will be covered in detail, as will strategies, purchasing trends, and perceptions on unmet market needs.

Corporate Decision Makers and Document Owners to be surveyed:

- Vice President/Director of Administrative Services
- Functional Owners of transactional documents, statement printing, and other key documents often managed by outsourcing providers
- Marketing Executives

Personal Interviews with Leading End-Users

An essential element of the project will be extensive primary research to address issues that previous industry analysis has not covered. The primary research will include a series of in-depth personal interviews with medium-sized and large companies that outsource document services. These discussions will cover current and future plans, key trends, and planned spending for document outsourcing. Of particular focus will be discussing who companies are buying from and why, as well as the outsourcing benefits being realized by clients in specific vertical industries.

Desk Research

Info Trends will also thoroughly examine existing market information, utilizing a variety of sources that include:

- Periodicals and trade articles
- Web sites
- White papers

Prospectus

- Published industry reports
- Industry databases
- Vendor white papers
- U.S. Industrial Census data

InfoTrends will also review research it has previously published as part of its Continuous Consulting Services and Multi Client Studies. Relevant research reports include:

- U.S. Document Outsourcing Market Forecast: 2007-2012
- Transpromo Multi-Client: Trans Meets Promo... Is It More Than Market Hype?
- The Future of Mail and Transaction Documents
- Document & Content Solutions: The Professional Services Opportunity
- Document Process Outsourcing: Business Strategies for Successful Market Engagement
- The New Corporate Print Customer: A Profile of a Market in Transition
- The Evolving U.S. Digital Color on Demand Printing Opportunity

Analysis & Project Deliverables

InfoTrends will conduct extensive analysis of the desk research, personal interviews, and surveys to develop a comprehensive understanding of the opportunities and issues for document outsourcing providers and corporate executives/decision makers.

The specific deliverables from this project will include:

- An Executive Summary PowerPoint presentation that addresses key issues, findings, and overall recommendations.
- A detailed written report with text, charts, and graphs addressing the objectives of the study – with the discussions and interpretations defined above.
- Tabulated data with information representing the full set of data responses to the e-mail/Web surveys.

Document Outsourcing providers will receive:

- An understanding of where the best prospects and opportunities lie, including where decisions are being made and the criteria being used.
- Market segmentation and opportunities for outsourcing providers (by vertical industry and service category).
- A discussion of the key elements of a business plan for providers considering entry, or expansion of services within the document services spectrum. The services required today to successfully satisfy requirements within each industry will be a particular focus.

Prospectus

Corporate Executives and Decision Makers will receive:

- Profiles of key providers and services relevant to the document outsourcing needs they have
- An understanding of the challenges and solutions being employed within each vertical market. Particular focus will be on the benefits and ROI being realized from outsourcing.
- A discussion of the key criteria for selecting the right service provider.

Project Schedule

InfoTrends intends to begin this project in September 2008. Based on the following schedule, the project will be completed with materials distributed by February 2009. Throughout this project, InfoTrends will issue regular updates on its status. Early study sponsors will have input into the development of the interview guides and will help shape the overall study.

Milestone

Sponsor and early subscriber sign-up begins
Desk research and development of survey guides
Sponsor interviews and survey input
Field survey
In-depth interviews
Data tabulation and data analysis work
Report development
Report delivery

Timeline

September
September
Late September/Early October
October
October/Early November
November/December
December/Early January
February 2009

Prospectus

Terms and Conditions

Liability for Advice

Although reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

Copyrights

InfoTrends retains all copyrights. The reproduction of any materials is prohibited without written consent from InfoTrends.

Confidentiality

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to re-use any non-proprietary information as part of its ongoing analysis of the office automation and printing and publishing industries.

Timely Delivery

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

Terms

One half of fee upon initiation and one half upon report delivery.

Prospectus

Authorization Form

The Document Outsourcing Evolution - A Vertical Market Analysis

Please enter my order as follows (fax completed form to +1 781 616 2121):

- | | |
|---|------------------------------|
| <input type="checkbox"/> Early subscriber (before 11/28/08) | \$11,995 |
| <input type="checkbox"/> Subscriber (after 11/28/08) | \$13,995 |
| <input type="checkbox"/> Personal presentation | \$2,500 plus travel expenses |

Purchase order number: _____

Signature _____

Name _____

Title _____

Company _____

Address _____

City, State, Zip _____

Country _____

Telephone _____

Email _____