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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.

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Document Assessment & Optimization Study

New Challenges & Opportunities for the Office Equipment Market

- *Discover* the adoption rates of document assessment practices
- *Uncover* who is being affected by utilizing these assessment tools
- *Reveal* customer satisfaction of document optimization choices

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Who should subscribe

- *OEMs*
 - *Facilities management companies*
 - *ISVs*
-

Introduction

In 2004, InfoTrends conducted several surveys on Document Tracking/Document Assessment and revealed some staggering statistics on what people are potentially spending on their office documents. For instance, it was concluded that companies spend between 2% and 3% of their annual revenues on documents and document-related issues. In addition, many of these companies cannot account for all their spending. Less than half did not know about document assessment and optimization solutions but were very interested in finding out more about them.

There are many solutions available on the market today, ranging from applications that enable organizations to perform these assessment services to completely managed services by third-party vendors. Many vendors are evangelizing the cost savings of document assessment services and document optimization tools, but it has been difficult to size what companies are actually saving from an industry perspective.

This report will discuss the types of companies that are utilizing these tools, uncover how companies are spending and saving on hardcopy documents when performing these assessment services, understand who is being affected by the recommendations of vendors or dealers, and determine if customers are truly satisfied with their results and investments.

Project Objectives

This study is designed to help manufacturers and distributors of office copying and printing equipment understand the role and prospect of document assessment and print optimization services and software. Some of the unknowns that were uncovered during this research study include:

- Understanding customer adoption rates for cost optimization solutions
- Evaluating the goals and initiatives that customers want in a document assessment
- Determining who is influencing these decisions
- Considering the market players that are being affected by these types of solutions
- Discussing the types of solutions that are penetrating the office equipment market
- Determining which products are being removed and what are they being replaced with
- Evaluating how customers' printing and copying habits have changed and whether they are more or less productive

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- Determining how much customers are saving based on their document assessment solution
- Understanding customers' satisfaction with their results and their investments

As part of this report, InfoTrends is also providing a dedicated market estimate and forecast for the document assessment solutions market.

Market Research

This study will use a combination of primary and secondary research to determine the market requirements and opportunities for document assessment and optimization solutions within corporations of various sizes.

Secondary Research

InfoTrends has conducted extensive research in the office document market space. Relevant research reports and forecasts will be leveraged as part of this study. We will also thoroughly examine existing market information from a variety of sources, including government and industry association data and published reports.

Primary Research

This study is based on a combination of research activities, specifically:

- A structured survey of end-user companies in the U.S.
- Personal interviews with office equipment resellers
- Personal interviews with end-users at companies that have done document assessments
- A review of historic market estimates and reports by InfoTrends

InfoTrends then consolidated and analyzed all of the primary and secondary research when writing this report.

Structured Survey

InfoTrends developed a structured survey for use in gathering the opinions of end-user companies in the U.S. about their document assessment and fleet optimization trends. The final survey had a total of approximately 88 questions, which were designed to directly address most of the project's main objectives. A copy of the actual survey can be found in the Appendix of this document.

InfoTrends then tabulated the results of the survey, and cut those tabulations in various ways, including:

- By company size (small companies with 50 to 99 employees, medium-sized companies with 100 to 999 employees, large companies with 1,000+ employees)
- By level of document assessment experience (considering, self-assessors, third-party assessors)
- By industry (healthcare, retail, education, construction, etc.)

InfoTrends charted the main results from these tabulations, and the slides in this document provide key evidence throughout. The Figures in this document illustrate results according to three main perspectives: by total sample, by company size, or by industry.

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Personal Interviews

InfoTrends conducted a series of interviews with end-users, and also held discussions with dealers, distributors, and ISVs (independent software vendors). The end-user interviews were leveraged to provide additional insight to overall document assessment experiences. Meanwhile, the dealer/distributor/ISV interviews addressed questions about the dealers' experiences with selling and implementing document assessment services.

Review of Market Estimates

The InfoTrends staff members who were responsible for this report studied existing market information from InfoTrends' continuous information services that are dedicated to the copier and printer markets, particularly the DPS (Digital Peripherals Solutions), NDS (Network Document Solutions), and PWS/DOCS (Production Workflow Solutions/Document Outsourcing) Consulting Services.

Analysis

The InfoTrends staff members responsible for this report worked with all the insights gathered in the survey, the interviews, and the market estimate/forecast process to compile this report. We also formulated recommendations that we hope will be helpful to clients who are active in the document assessment market.

For the structured survey, InfoTrends divided the end customers into four different segments to understand their document assessment and optimization initiatives. (Note: For the remainder of this document, we will refer to "document assessment and optimization" as simply "document assessment"). In analyzing this survey, InfoTrends placed the greatest focus on survey respondents that fell under the first three segments. The four segments are as follows:

The company is considering document assessment, either by purchasing services from an outside supplier or conducting it internally with its own staff

The company has performed document assessment using internal staff members, and leveraged dedicated assessment software or other software to accomplish this (these are "self assessor" companies)

The company has performed document assessment using the services of a third party. Note that these third parties and their services can vary greatly, ranging from an ongoing assessment associated with a facilities management company to a one-time service offered by a dealer or consultant.

The company has never performed document assessment and is not considering doing so. These customers play only a small role in the report, but it is nevertheless an important one. InfoTrends recorded responses from these companies for a small number of demographic and company-descriptive questions before excluding them from the detailed survey of companies that have performed document assessments or are considering doing so. InfoTrends then used the results of the responses from the companies in this "never performed/not considering" group to characterize the broader, untapped market for document assessment services and products.

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Vendor Profiles

As part of this research, InfoTrends will include vendor profiles on leading-edge solutions providers. The profiles will include a review of the products and methodologies used.

Project Deliverables

InfoTrends conducted extensive analysis of the desk research, personal interviews, and structured survey to develop a comprehensive understanding of the opportunities and issues for print cost optimization and management solutions. Clients will receive a combination of reports, presentation materials, and research data for senior management, product managers and planners, and sales and marketing executives. The material will include:

- An executive summary that addresses key issues, findings, and overall recommendations
- A PowerPoint style report with text, charts, and graphs addressing the objectives of the study
- A set of presentation-style overheads for internal communication of the research results
- Market forecast with tables, charts, and assumptions
- A Web-based presentation on the general findings and recommendations

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Timely Delivery

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Terms

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

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Authorization Form

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