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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.

Capturing the SMB Business Communications Opportunity

With over 6 million establishments, the small and medium-sized business (SMB) segment represents a significant market opportunity for service providers. Access to the Internet and affordable digital technology has had a major impact on how SMBs fulfill their business communications needs.

The study will:

- Investigate SMB spend across document types (e.g., marketing collateral, direct marketing, transaction documents, point of sales material, and publication)
- Probe the usage of the Web, e-mail, and mobile channels as means for customer acquisition/retention activities
- Gain an understanding of SMB preferences and relationships with external business communications service providers
- Identify pain points and future requirements for business communications across major SMB verticals
- Explore innovative approaches in serving the SMB market

Prospectus

Who Should Subscribe?

Service Providers, including:

- *Commercial printers*
- *Quick print franchises*
- *Digital print specialists*
- *Office superstores*
- *Document outsourcers*

Print equipment and suppliers

Software solution providers

Introduction

SMBs account for the majority of U.S. firms. They include hairdressers, drycleaners, landscapers, veterinarians, dentists, lawyers, and local mom-and-pop retail stores. According to the U.S. Census, there are roughly 6 million firms in the U.S. with less than 500 employees and 5.3 million of these have fewer than 20 employees.

Despite their size, SMBs have a wide range of communications needs from corporate identity (e.g., business cards), marketing collateral, direct marketing (e.g., direct mail, e-mail, Web), point-of-sales material, transactional documents (e.g., invoices) to publication. The fragmented nature of this market, however, makes SMBs one of the most challenging markets to reach. Nevertheless, as with all other markets, the Internet changes everything. Access to the Internet and affordable digital technology has drastically changed how SMBs fulfill their business communications needs. Requirements for are getting broader and more complex as marketing spends are moving online. Furthermore, the need for more efficient business processes and regulatory compliances in many SMB verticals demand for more robust document management.

Clearly, these changes represent a tremendous opportunity for service providers. SMBs need help in figuring out how to successfully market products and/or services in a single channel, be it direct mail, retail, or the Internet. These SMBs also want the ability to extend their communication efforts across two or more channels, but do not have the time or money to do so effectively by themselves. We have seen a number of service providers capitalizing on these opportunities. Savvy service providers are leveraging the Web to build vertically-focused solutions to aggregate volume in various SMB market segments.

Prospectus

Project Objectives and Scope

The study is designed to provide service providers a better understanding of the SMB business communications market opportunity and its future requirements. The study will not only help service providers navigate the SMB market, but will also highlight various innovative approaches to the market.

The study will cover the following aspects of the SMB market:

- Top business priorities for the next 12 months
- Key applications by SMB verticals
- Spend and outlook across document types:
 - Corporate identity (e.g., business cards, letter heads)
 - Signs, banners, posters, and point of sales material
 - Marketing collateral (e.g., brochure, sell-sheets, kits)
 - Direct marketing (e.g., direct mail, e-mail, and Web)
 - Transaction documents (e.g., invoice, statement, contract, notification)
 - Publication (e.g., newsletters, manuals)
- Internal output infrastructure and resources (e.g., hardware, software, personnel)
- External business communications service providers' relationships, considerations, and prevailing go-to-market strategies
- Usage of e-mail, Web, and mobile channels for customer acquisitions/retentions
- Current pain points and future requirements on business communications

Market Research

The research included in this study will consist of:

Structured Web survey with small and medium-sized businesses (1,200)

InfoTrends will deploy a structured Web survey to at least 1,200 SMBs (firms with less than 500 employees) in the United States. The respondents of the survey will come from major verticals such as:

- Retail
- Professional Services (e.g., legal, accounting, architecture)
- Healthcare (e.g., doctor's offices, veterinarian)
- Real estate
- Accommodation & food services (e.g., restaurants, hotels)
- Personal Services (e.g., dry cleaning, hair salon, funeral homes)

The result of the structured Web survey will be essential in understanding key applications, current output infrastructure, pain points, and future business communications requirements of this market.

Prospectus

In-depth Interviews with small and medium-sized businesses (10-12)

InfoTrends will conduct in-depth interviews with select SMBs in major verticals. The results of these interviews will be essential to complement the result of structured Web survey.

In-depth Interviews with business communications services providers (5-8)

InfoTrends will conduct in-depth interviews with service providers that target the SMB market. The interviews will be essential in understanding innovative go-to-market approaches in the SMB market.

Desk Research

InfoTrends will thoroughly examine existing InfoTrends market information, utilizing a variety of sources, such as trade articles, Web sites, whitepapers, published industry reports, and U.S. census data.

InfoTrends will also review research that it has published previously as part of its continuous consulting services and multi-client studies.

Analysis & Project Deliverables

We will conduct an extensive analysis of the desk research, personal interviews, and surveys to develop a comprehensive understanding of SMB market. Subscribers of the study will receive a combination of reports, presentation materials, and data (outlined below):

- An executive summary that addresses key issues, findings, and overall recommendations
- A detailed written report with text, charts, and graphs addressing the objectives of the study
- A PowerPoint presentation for internal communication of the research results
- A data book of the Web survey research for additional analysis of key questions and market segments with extensive cross-tabulations

Project Schedule

InfoTrends intends to start the project in August 2009. Based on the following schedule, the project will be completed with material distributed by November 2009. Throughout the project, InfoTrends will issue regular updates on the project status.

<i>Milestone Completions</i>	<i>Week(s)</i>
Desk Research, development of survey guides, translations	1-5
Survey work	6-10
Personal interviews with leading PSPs	8-10
Data analysis and report development	11-16
Report delivery	17

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.

Authorization Form

Capturing the SMB Business Communications Opportunity

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

- | | |
|--|----------|
| <input type="checkbox"/> Early subscriber (before 8/03/09) | \$8,995 |
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