



STRATEGY  

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PARTNERS

# Innovation in On Demand Communication

Participation proposal

regarding

Market research and Analysis Report

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## 1 Introduction

Strategy Partners is planning to write a market research report regarding **"Innovative solutions for On Demand Communication"**. After the successful first reports "Innovation in Document Communication" and "Innovation in Automated Document Process Management" which were launched in 2008, it's time for the third in the series of "Innovation in ..." reports. The first report discussed the world of document composition and the possible innovations for organizations in document communication. The second report focused more on the process optimization in the print and mail departments.

Purpose of this new report is to help organizations who are struggling to innovate in the new world of **"On Demand Communication"**.

Within the last years there are drastic changes when it comes to communicating to our (internal or external) customers. As an organization we were used to create (paper) documents and sent them to the recipient. Documents like marketing material, proposals, invoices, policies, investment proposals, etc. Since the early 90's the paper based communication has changed under the influence of document composition techniques to a more personalized approach. The last one or two years have seen another change in communication; **"the recipient wants to decide about the content of the communication and how and when it is delivered"**. This is giving organizations new challenges in the distribution processes and mechanisms. Many organizations now have questions like;

- How can I set-up a Print on Demand environment for my organization?
- How can I reuse the content from my batch oriented document production processes for On Demand communication?
- What are the aspects of a Customer Self Service Portal?
- What are the options to use a hybrid mail solution?
- How can I guarantee the authenticity of the documents through security?
- The relationship between a back-office process and a document portal.
- How do I integrate the Document Management environment and the traditional Output production environment with the On Demand communication environment?
- How do I maintain Corporate Identity, use Variable Data, let Marketing or end-users control content, etc?
- What software solutions to use and how to implement?
- Etc. etc.

This document will describe the structure and content of the report in more detail. As a vendor in this space you're invited to participate in this report through a vendor profile. The final delivery of the report is planned for summer 2009.

## 2 Purpose of the report

The report has a main objective to inform the reader about the (new) options of On Demand Communication. It's still an area with continuous developments in technology and in business deployment. On Demand Communication is more than building a Print on Demand site for ordering marketing collaterals. Print on Demand is an element of what organizations try to achieve with On Demand Communication. One of the most profound examples is the creation of a Customer Self Service portal. A customer or prospect goes to the Internet and wants to enquire on-line for a new car insurance. The whole process of entering information, generating a quote on-line, sending the proposal as PDF, having it confirmed, archived and initiating the issue of a new policy, is part of the On Demand Communication environment.

Other samples of On Demand Communication include:

- Hybrid mail. Creating a document electronically and have it printed close to its final destination.
- Integrated Marketing Campaigns. A marketing campaign is not just one piece of communication, it's a chain of messages and responses, through various media channels, automated, integrated and connected.
- The authenticated delivery of electronic documents. More and more documents are sent by e-mail, but how can the receiver authenticate the document as original?
- A print on demand environment which includes, variable data content, cost optimization, cost control, distributed printing, tracking and tracing, security and authorization, etc.
- Automated proofing processes which rely on electronic data interchange instead of the physical transfer of sample materials.
- Automated processing of the paper document production processes and ad-hoc document production processes, using one content source.

There is a long list of vendors who offer elements of the overall On Demand Communication architecture. Unfortunately that doesn't make it simple for the organization to make a decision. Sometimes no decision at all is taken. From a market information perspective, most of the reports or white papers focus on the technology site or just compare several vendors on technology features and functions. Not much is available to really support the organization in evaluating possible innovative solutions, creating a strategy and project plan, see the whole picture and select the appropriate vendors.

When looking at the European (but also American and Asian) markets the amount of implementations which can be recognized as a fully fledged On Demand Communication implementation are still limited. Mostly a variety of stand-alone systems are used, complicated manual processes, redoing and retyping information, no or hardly any security are used. One of the major reasons is the unawareness of the possibilities with the new products, what really can be done, no priority, no budget, split of responsibilities, etc.

The purpose of this report is not to sell the software or hardware. It will inform the reader by going through a set of questions, discussing innovative approaches and highlighting vendor applications with their business benefits. In the end the user should make the decision on where he stands today and what would be the best next step. Where a next step can still be to focus on other priorities,

implement a point solution, or do an enterprise wide deployment. After reading the report the organization should be able to define a clear document process communication strategy and articulate the benefits for his organization.

The report is not intended to be a next in line product comparison document on the software for Print on Demand or Web to Print. The vendor profile descriptions will be limited on the technical features and functions. Focus is on the business solutions and tangible business benefits. It needs to provoke the reader to rethink about his current strategy and revise where appropriate. Then the next steps for getting budget approval and starting a proof-of-concept phase should be easy to achieve.

The report will have a focus to the European markets. The language will be English. Translation to other European languages is optional and will be based on demand.

### 3 Market research into markets, trends and customer expectations

Strategy Partners will use its international experience and network for the research and analysis among the end-user and the organizations. This will lead to the following results:

- Insight in the trends and expectations regarding On Demand Communication.
- Market segments and corresponding characteristics
- Selection criteria and prioritization
- Benchmark implementations and achieved business results.
- What is the value of the different elements in On Demand Communication?
  - Document Composition
  - Internet Portal
  - Variable Data Printing
  - Automated Processing
  - Security
  - Distributed printing
  - Multi-channel distribution
  - Cost optimization and cost calculation
  - Integration to business applications

The research approach which will lead to the desired results will be described in the next chapter.

### 4 Research method

#### **Research method among organizations:**

Differentiated per industry several organizations will be interviewed for background information around there strategy for On Demand Communication. The interviews will be done either on-site, by telephone or through an on-line survey. Strategy Partners will be selecting customers who are representative for the selected market segments (industries). As an option the vendor can promote

potential or existing users for an interview. The following industries will be selected;

- Banking and Insurance
- Utilities
- Retail
- (Local) Government
- Industry
- Printing companies
- Document Process Outsourcing vendors

The target is to have at least several organisations per segment. They could already be well advanced in On Demand Communication or novice users. Objective is to discuss their ideas, future thoughts and the strategies they have about automated document process management.

Primarily the interviews will be done with;

- IT Managers
- Facility Management or Corporate Services managers
- Business unit managers
- Marketing managers

Topics which will be discussed during the interviews will be:

- What is the current status of the implementation with respect to On Demand Communication type of solutions?
- What types of applications are used, since how long and what is the integration with other business applications.
- What are the experiences so far?
- Is there a specific strategy for Customer Self Service portals?
- What are the day to day issues?
- What are future demands? E.g. integration, process automation.
- What are the expectations for investment, which areas?
- How familiar is the organization with the vendor market, the products offered and the value propositions.
- What is the perception of the current POD and W2P solutions and positioning?

Additional purpose of the research is also to do an inventory of which software is used by which organizations for which purpose.

### **Research method among vendors**

Strategy Partners is concerned with an independent presentation of the various suppliers in Europe. As mentioned in the introduction of this document the vendor profiling will not entirely be based on the technical specifications of the offered products. Strategy Partners is planning to write the report to introduce the concept of On Demand Communication specifically for new users or users who want to enhance their current paper based push processes. For them the day to day worry is about the efficient delivery and how to open multiple distribution channels without duplication or huge IT efforts.

During a one day interview/discussion with the vendor the profiling, positioning, strengths, and business applications and their benefits will be discussed. During this interview the feedback from the discussions with the organizations will be used to help define the specific business applications.

Topics which will be discussed are;

- Positioning, vision and strategy.
- References
- Technical architecture
- Horizontal or vertical business solutions and/or frameworks
- History
- Organization, world and Europe
- Sales channels
- Strengths and opportunities

The purpose is to create a complete picture of the vendor. As operational in Europe and with a focus on the On Demand Communication type of solutions and services. With the information from the profile and the selection matrices the reader should be able to make a decision if he invites the vendor on the short-list. The amount of time we spend in answering generic RFP's, which are usually unclear, don't give a clear direction regarding the objectives, and usually contain just the generic legal conditions and have a short answering timeframe, should be avoided.

## 5 Report

### 5.1 First part, market research and advice

Within the first part of the report an overview will be given of the market trends within On Demand Communication (POD, W2P, Hybrid mail, multi-channel delivery, security issues). There will be a part on the past developments, the trends of the last year(s) and the expectations for the future. A discussion around the new functionality and innovative solutions of the currently available tools in document communication to support the more efficient distribution of documents in a distributed and multi-channel environment will have a strong emphasis.

Within the report a few organizations will be described as a benchmark customer case story. As a vendor there is the option to promote an existing customer who wants to be referenced as a benchmark user of your software. The objective is to have at least 4 customer case stories represented in the document. The input from the organizations will be done through on-site interviews and through an on-line survey. The objective of the first part of the document is to help the reader in creating a strategy, select innovative business applications which will help him to achieve the business goals and to select a short-list of vendors for the proof-of-concept period.

The report will not present a "magic quadrant" or best-in-class. As Strategy Partners we don't believe in a technical comparison of the products resulting in who is best or has the most features and functions. Each of the software solutions has its value proposition, strengths and advantages (and disadvantages) within certain business issues and existing technical infrastructure. The reader will have to make the final decision on who he will invite for the next step. The report will make an advice through selection matrices with functional, business or other criteria, to select 2 till 4 vendors for the short-list.

## 5.2 Second part, vendor profiles

The second part of the report will be used to present the vendors for On Demand Communication in Europe. A list of the invited vendors is given in paragraph 8.1.

The vendor profile will not be a summary of the technical capabilities of the product portfolio. The emphasis will be at the overall architecture, vision, business applications, references and market approach. The essence is that the reader can make a decision if the vendor fits within its business needs for creating an On Demand Communication environment. The reader should be able to verify if this vendor fits within his needs from a business strategy perspective. Not to verify which document formats, processing performance and technical details of the integration are available. The primary verification is via the described business applications and the business benefits.

## 6 Deliverable

### 6.1 Target audience

The report will have a target audience of:

- IT Managers
- Facility Management or Corporate Services manager
- Business management
- Commercial printers
- BPO and consultancy organizations
- Suppliers within the Output Management space

### 6.2 Availability and promotion of the report

The distribution of the report will be done through the Strategy Partners website as a download option. The fee applicable for the download will be €475 or USD\$600. Additional distribution will be done through order forms.

Promotion of the report will be done through press announcements, articles in business magazines, industry newsletters, e-mail campaign and various websites.

### 6.3 Advantages for the participating vendors

Participation to the report with a vendor profile will deliver the following advantages to the vendor;

- Market research and analysis benefits:
  - Feedback session (conference call) on market positioning. SWOT Analysis of the vendor, the products and the positioning against its competitors.
  - Insight in all research results.
  - Insight in the market trends and expectations of possible future users.
  - Availability of a written vendor profile for further usage.
- Marketing benefits:

- Publication and profiling of the vendor to the market through a report written by a respected and independent market research organization.
- Possibility to use the report for internal purposes freely and option to quote the report in external publications or presentations.
- Can be used internally for strategy development, training, and marketing purposes.
- Participation of the vendor in the report will be mentioned in the various announcements of the availability of the report.

## 7 Planning

The final delivery of the report is planned for summer 2009. The availability of the report will be announced through the various initiatives.

- Press releases
- Announcement in various newsletters
- Through the Strategy Partners website
- Advertisements in various business magazines

The planning of the development will be strictly adhered. Only in exceptional circumstances a delay can be possible. This also means that the writing and verification of the vendor profiles must be done within the given time limits.

Planning.

ID	Task Name	Start	Finish	Duration	January	February	March	April	May	June	July
1	Initial proposal	5-1-2009	9-1-2009	5d	█						
2	Vendor discussions	12-1-2009	30-4-2009	4 mths		█	█	█	█		
3	Generic market research	2-2-2009	13-3-2009	1,5 mths		█	█	█			
4	Prepare interview / survey	16-3-2009	30-4-2009	1,5 mths			█	█	█		
5	Market research	4-5-2009	29-5-2009	1 mths					█		
6	Vendor profiling	6-4-2009	29-5-2009	2 mths				█	█		
7	Report writing	4-5-2009	26-6-2009	2 mths					█	█	
8	Quality Assurance	6-7-2009	31-7-2009	1 mths							█
9	Final delivery	31-7-2009									█

## 8 Applicable fees for the development of the report and the usage by the vendor

### 8.1 Vendor profile

To create the extended vendor profile with the SWOT analysis a fee will be charged of €5.000 (USD\$ 7,000). The fee will be used to write the profile according to the separately attached structure (Table of Contents). The vendor profile will be approximately 10 to 11 pages. The vendor can create the profile himself or have it done by Strategy Partners (preferred option). Either case the vendor will have the option to verify and amend the profile. An on-site extended interview (unless otherwise agreed) with the exchange of information will be part of the creation of the vendor profile. The time for the interview will be approximately 4 to 5 hours. The exact place or location where the interview will be done can be discussed. During this interview the product portfolio, applications, positioning and strengths will be discussed.

As an option the vendor can opt-in for the vendor profile only without a full insight in the user survey, interview results, and SWOT analysis for €3.000 (USD\$ 4,200). This option will still include the full day to discuss the organization, product(s), solutions and services.

Any travel costs in excess of €500 could be recharged additionally.

The invitation to participate in the report with a vendor profile will be sent to the following list of vendors. A vendor should have a presence in Europe through references, resellers or distributors. Strategy Partners has the right to invite

additional vendors if deemed applicable. The following list of vendors is initially invited to participate:

- Abstract MRM
- Apago Inc.
- Apollo Systems LLC
- BlueMailCentral
- Cordeo
- Criteo
- HubCast
- Inventive Designers
- MindFireInc
- Océ
- Peleman
- Press-sense
- Printable Technologies
- PrintSoft – WebDirect
- ProofHQ
- Rochester Software Associates Inc.
- WAVE
- Xerox – EMS solution and services
- XMPie

The intend is to have a maximum of 12 vendors participating in the report.

## 8.2 Research results

The market research results as a conclusion of the discussion with vendors and organizations will be shared with the vendors. Obviously this will be done within the limits of confidentiality. The sharing will be done during a second conversation (conference call).

## 8.3 Usage rights end report

The vendor who paid the fees for the vendor profile will get a copy of the final report. This copy can be used freely for internal purposes, e.g. training. External usage is limited to a customers and prospects. During presentations to prospects or customers the vendor is able to quote the report, make use of its conclusions and leave a copy for further reference.

## 8.4 Option to use report externally

The report and its conclusions can be used externally via:

- Press release
- Quote on Internet site
- In direct contact with a prospect or customer
- During presentations through quoting the report and its conclusions.

It is not possible to have the report available as a free download on the Internet homepage. Distribution can only be done for registered users of the website.

## 9 Conditions

The next generic conditions are part of the arrangement between Strategy Partners and the vendor.

- Participation to the report with a vendor profile as described is possible until the end of May 2009.
- All shared information will be treated as confidential. The sharing of such information via the vendor profile will only be done after confirmation of the vendor.
- The vendor can deliver its content for the vendor profile until end of June 2009.
- Strategy Partners has the option and the right to verify all delivered content and correct where deemed necessary. Final verification still applies.

## Strategy Partners Nederland BV

Strategy Partners is an established professional retainer and project based IT consultancy business. We are an authoritative source of detailed analysis and advice on the ECM, BPM and document application software markets in Europe, which is provided at executive level and personalized into the context of our clients.

We deliver independent consulting and original market analysis in the key areas of Content Management, Business Process management (BPM), Electronic Document and Output Management, Content and Document Capture, Services, Information Resource Planning, Knowledge Management (KM) and Outsourcing Services.

### Strategy Partners' Value

Our value is based on clear differentiators:

- ▼ All our research and analysis is customised for our clients and delivered from their individual perspective. We do not provide the generic "blue sky" market views, as we believe they blur the real issues, and waste clients' time.
- ▼ We know the CEOs of the companies that would be appropriate to approach and introduced to your executive team.
- ▼ We can quantify the value of the markets in which you operate, and your position within them.
- ▼ All our services are delivered through face-to-face meetings to present a personalised service to all our clients. We do not publish generic research in the hope it will be of some interest. We research and deliver advice on what is important to you and your business.
- ▼ Our advice is actionable and pragmatic. We offer business-focused advice without flattery. We are not 'futurologists': we advise on what to do, today.
- ▼ We focus on what is possible in Europe today, because we have analysts on the ground in five countries. We have researchers in New York and California and so understand what is happening and is feasible in North America.
- ▼ Strategy Partners is independent and neutral. We do not sell long-term consultancy projects. Unlike other analyst companies we do not write reports praising individual vendors. We do not take positions in the stock of vendors we analyse. This ensures that our analysis and advice is always unbiased.

Strategy Partners is neither a market maker nor sells on behalf of its clients. It provides independent and original market research to quantify market opportunities.