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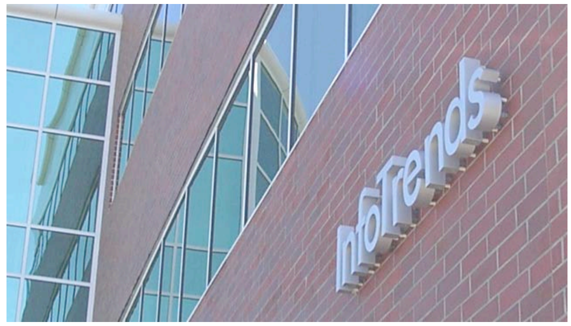


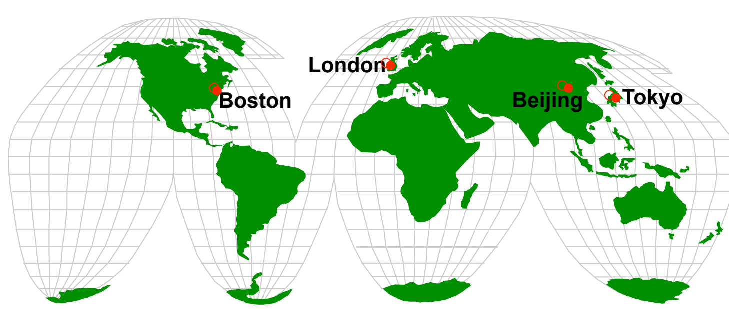
The Imaging Market in Transition: Moving From Boxes to Solutions

Jon Reardon
Group Director

Randy Dazo
Director

 www.infotrends.com

InfoTrends: Strategic Consultants for the Digital Imaging and Document Solutions Industries



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InfoTrends Consulting Services

	Hardware	Services	Software	Supplies
Consumer	• Digital Photography • Image Scanning • Photo Printing	• Internet Imaging • Digital Photography	• Internet Imaging • Image Scanning	• Communication Supplies • Photo Printing
Office	• Digital Peripherals Solutions • Image Scanning • China Printers	• Network Document Solutions	• Dynamic Content Software • Network Document Solutions	• Communication Supplies • China Supplies
Production	• On Demand Printing • Wide Format • Printing • Jetting Technologies	• Production • Workflow Solutions • Business Development Strategies	• Dynamic Content Software • On Demand Printing • Production Workflow Solutions	• Communication Supplies

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Document Solutions Definition

"A solution is a set of software and services often accompanied by hardware that solves a business problem, or improves a process, or creates a new business opportunity for a customer."

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2008 Office Equipment Mega Trends

- **The focus for vendors will shift from “hardware placed” to “pages captured”**
- **End customers will be looking for tighter control over document output with a desire for balanced deployment, effective device utilization, reduced costs, and a single-source supplier for their equipment needs**
- **Vendors introducing flexible pricing programs that are either usage based or coverage based**
- **Increased penetration of A4-size multifunctional products up and down the market**
- **Ink-based imaging platforms will further penetrate market segments that have been traditionally dominated by laser technology**

2008 Office Equipment Mega Trends

- **The market has evolved to a point where hardware and software will reached commodity status—leaving vendors few ways to differentiate their products.**
  - Color was a brief differentiator but that is no longer the case.
  - Solutions are currently a differentiator but they too will be harder to differentiate as vendors partner with similar ISV companies/vendors
- **Going forward, the real differentiator will be in the area of services. The converged printer/MFP market provides a wealth of opportunity in potential services revenue to vendors and their channel partners.**
  - This will range from document assessment programs to developing and deploying output management strategies, and even to full-blown managed service agreements.
  - Vendors are expected to introduce a wealth of software/solutions to help customers and dealers manage these opportunities.

Market Overview: Threats

- Average selling prices (ASPs) are in decline
- Monochrome placements and revenue are falling
- Products are faster and more complex, but prices are lower
- Channels have difficulty coping
  - Retail lacks expertise to sell/support complex products
  - Dealer and Direct channels struggle with lower margins

Market Overview: Threats

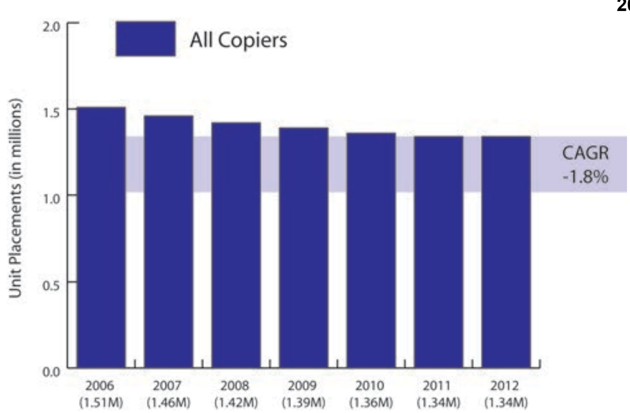
- Printer MFPs are taking a greater share of the imaging market and are moving upmarket in speed
- Inexpensive A4 printer MFPs are challenging more expensive A3 copier MFPs
- New inkjet technologies such as HP's Edgeline are threatening to disrupt the copier market
- Technology such as Xerox's solid ink also has potential to disrupt market

Market Overview: Opportunities

- Color placements and revenue are growing
- While overall page growth is slow, the growth comes from the most expensive pages – color pages!
- Sales of solutions-enabled devices help slow the decline in ASPs – supplier/customer dialogue based on value, not cost

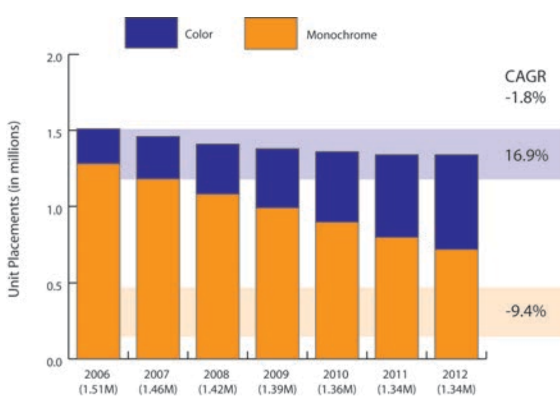
Market Placements & Forecast

Total U.S. Copier Vendor Placements Forecast: 2006-2012



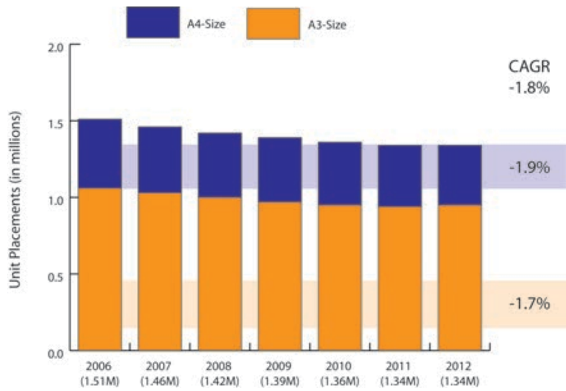
- **Total placements down 3% in 2007 compared with 2006**

U.S. Copier Placements Forecast by Color/Mono: 2006-2012



- **Growth in color will not sustain losses in monochrome**
  - Segment 1 monochrome experienced 28% decline due to speed creep, resulting in 10.5% increase in Segment 2
  - Segments 3 & 5 monochrome experienced slight declines due to shift to color
  - Segment 6 monochrome placements show slight growth with increasing focus on light production
- **Color placements growing steadily in all segments throughout the forecast period**
  - Color penetration expected to reach 46% of total placements by 2012

U.S. Copier Placements Forecast by Sheet Size: 2006-2012



- **A3-size units showing slight declines throughout the forecast period**
  - A3-size monochrome placements falling 13.6% between 2007 and 2012
  - Shift to color keeps market steady with growth of 16.5% in A3
- **A4-Size penetration not expected to occur in the copier market until the later years**
  - Monochrome A4-size placements declining slightly due to shift to color and competition from printer vendors
  - However, A4-size color placements expected to achieve 22.7% growth

2006 to 2010 US Shipment CAGR

A4 device

A3 device

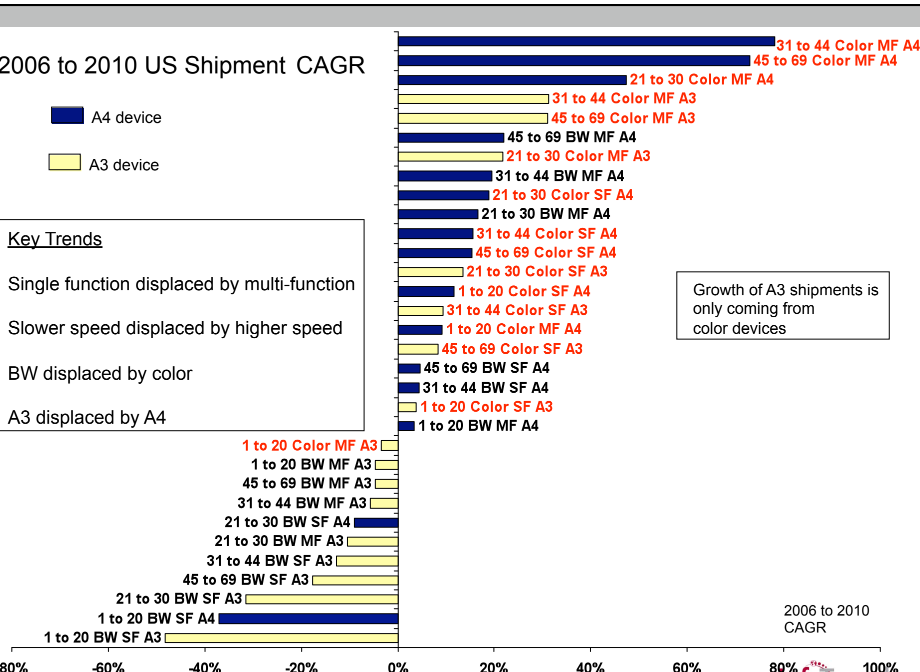
Key Trends

Single function displaced by multi-function

Slower speed displaced by higher speed

BW displaced by color

A3 displaced by A4



The Solutions Opportunity

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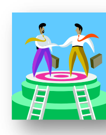
2008 Document Solutions Mega Trends



- **Solutions Platforms - Solutions platforms are still emerging and others are gaining strength**
  - New entrants from HP (WW) Open Extensibility Platform, Konica Minolta (Europe) Open API & Toshiba (US) eBridge Open Platform
- **My MFP – Utilizing the platform to create personalized workflows**
  - Xerox and HP are very big on creating these personalized workflows to help customers adopt solutions

- **Microsoft Office SharePoint – Huge impact on solutions in both the Enterprise and Office workgroup segments**
  - Microsoft Office SharePoint Server 2007 (MOSS) delivers many content services at the workgroup level
  - Adoption is substantial – $1 billion in revenues; 100 million licenses are milestones in 2008

- **Everyone is Talking about Managed Print Services (MPS) & Document Assessments**

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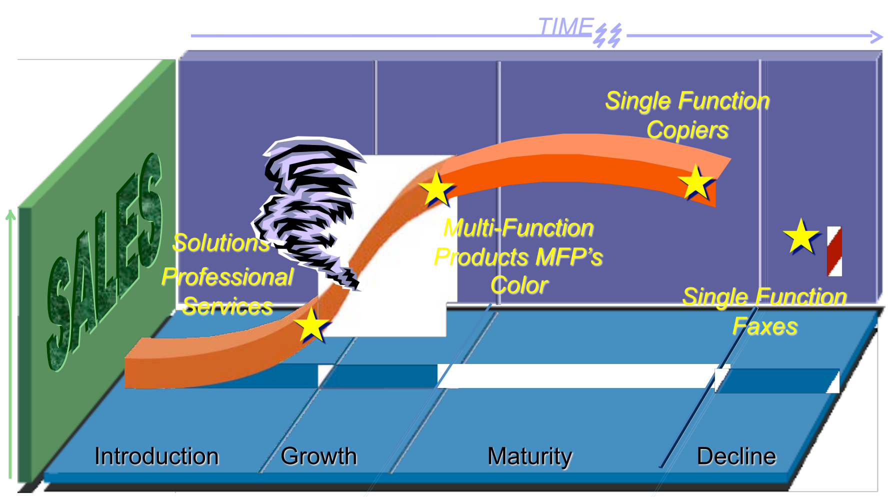
2008 Outside Driving Forces Affecting Solutions

- **Economy – The economy is having an affect on our market**
  - Customers are looking at ways to improve their return on investment
  - IT spending is being deployed more for improving efficiencies and cost cutting methods

- **Environment – The environment has always been a growing concern**
  - Concerns about improving the environment
  - Movement for the reduction of physical paper usage and more electronic document management

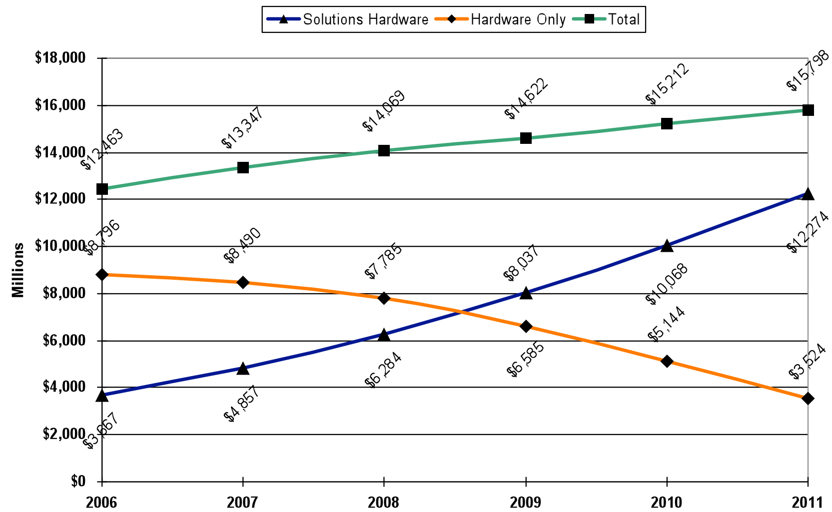
- **Regulatory Compliance – Compliance is driving new IT initiatives**
  - Documents are at the heart of these risk
  - Electronic document management and workflow solutions address compliance initiatives

Technology Lifecycle



Introduction	Growth	Maturity	Decline
▾Growth slow ▾High prices ▾New standards	▾Demand increases ▾Prices fall ▾Rivalry low	▾Demand flattens ▾Cost cutting ▾Industry consolidation	▾Demand falls ▾Prices cut ▾Rivalry increases

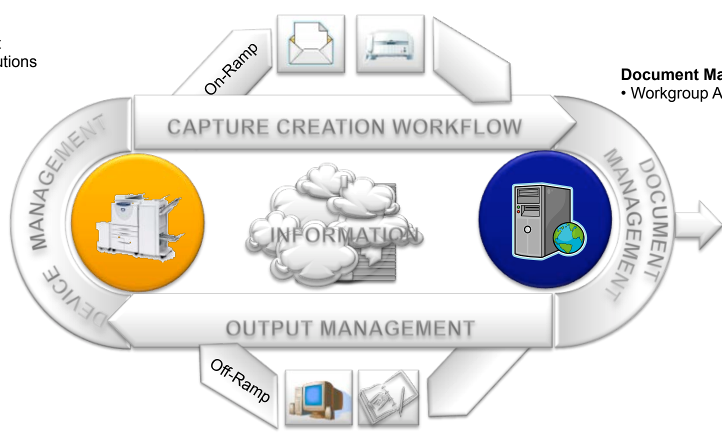
Revenue Comparison - Solutions Driven vs. Hardware Only Sales



Workgroup Solutions

Device Management:
• Monitoring
• Metering
• Assessment Service Solutions

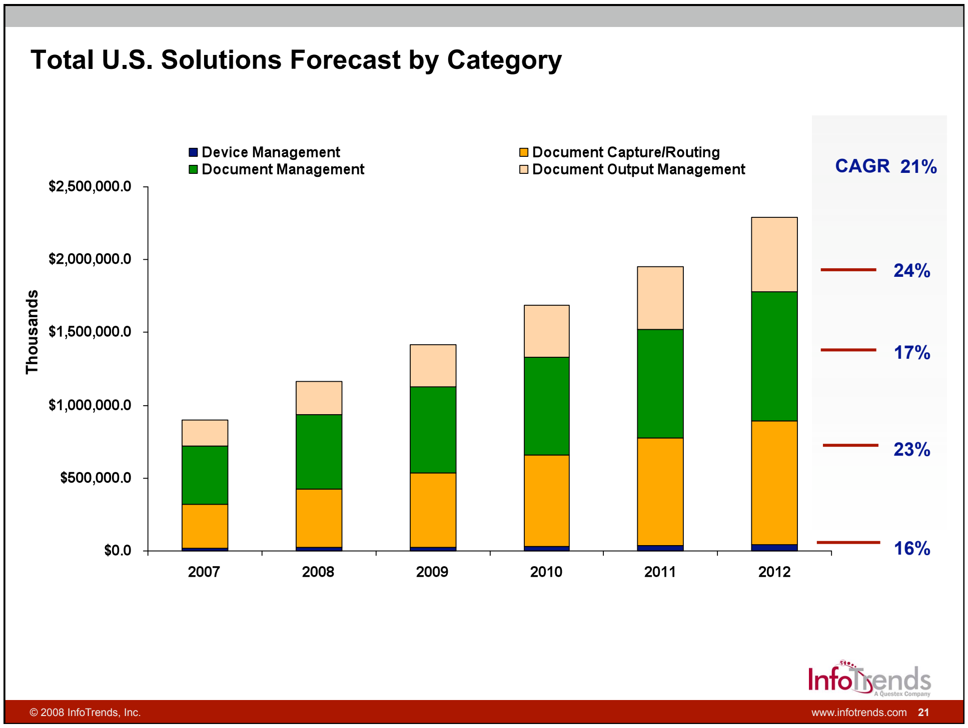
Scan/Creation to:
• e-mail
• Fax
• archive



Document Management:
• Workgroup Archive

TO:
Enterprise Document Management System

Output to:
• Printer/Copier
• PC
• Accounting



Total U.S. Solutions Forecast by Category
Device Management
Document Management
Document Capture/Routing
Document Output Management
CAGR 21%
$2,500,000.0
$2,000,000.0
$1,500,000.0
$1,000,000.0
$500,000.0
$0.0
Thousands
2007
2008
2009
2010
2011
2012
24%
17%
23%
16%
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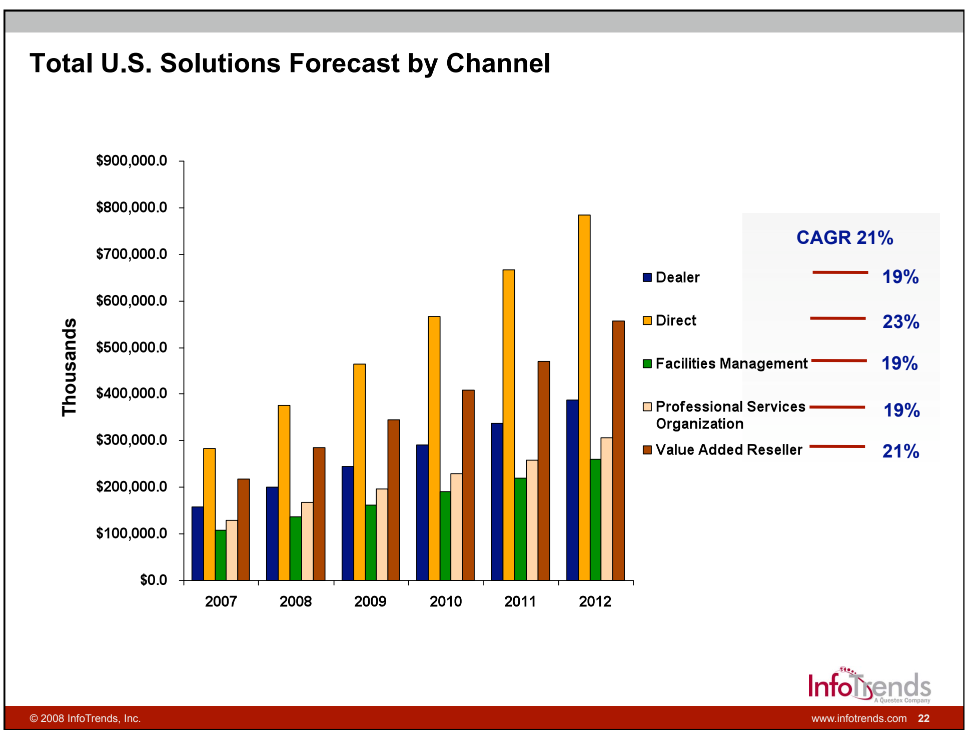

Total U.S. Solutions Forecast by Channel
$900,000.0
$800,000.0
$700,000.0
$600,000.0
$500,000.0
$400,000.0
$300,000.0
$200,000.0
$100,000.0
$0.0
Thousands
2007
2008
2009
2010
2011
2012
CAGR 21%
Dealer
19%
Direct
23%
Facilities Management
19%
Professional Services Organization
19%
Value Added Reseller
21%
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Five Phases of the Solutions Evolution

- Phase I – Build Partnerships & Solutions Portfolio
- Phase II – Build and Educate a Solutions Sales Team
- Phase III – Build Professional Sales and Support Services
- Phase IV – Package Solutions Ecosystems
- Phase V – Simplify the Solution & Process

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Successful Solutions Programs

- Software Partnerships – The best solutions programs have a good amount of third party partner software and some internally developed software or services for differentiation
- Why have so many partnerships? – It allows you to enter into deals that have already been made with those same partners that your competitors have already forged or with enterprise incumbent software solutions
- Channel Programs & Training – The channel needs incentives for solutions as they do for hardware or they will never sell solutions. Also engaging customers in a solutions lead sale or by "Problem Solving" is a different art then taking hardware orders
- Professional Services – Solutions also include Services which can be a substantial part of the overall sale, which is another form of reoccurring revenue and your future differentiator – it all comes back to customer intimacy, knowing their business and solving their problems
- Build an Ecosystem around Solutions – The best strategies have partnerships, platforms, channel, and professional services and support to drive the solutions ecosystem. The best software solutions are tied together nicely into packages that are integrated and easily executed by professional services.
- A Path that Customers Understand – The best solutions strategies and engagements start simple and that are engaging to customers (they don't even know your selling solutions) ie: Document Assessments – they can immediately understand the affects to their bottom line and then lead to more complex scanning and archival solutions that also will save a company money

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OEM Platform Initiatives for Independent Software Vendors

- **Two basic approaches to foundation platforms today: Web Services or Embedded (Java).**
- **Provide a core set of SDK's or API's that programmers can use to access the full functionality of Digital MFPs**
- **ISVs accelerate the time to integrate software by leveraging their core development competencies**
- **Many ISV applications take the On-ramp and Off-ramp capabilities of the MFP and incorporating it into their current application offerings, ie; capture, workflow, storage, routing, fax, cost accounting, tracking, etc.**

Why Java?

Pro's

- **Embedded Java will run independently without a server**
  - If the server goes down the copier can still run the application
- **Capability of "Serverless" applications**
- **There are many Java developers in the market**

Con's

- **Upgrading of platform or software is cumbersome because each device needs to be updated individually – but many companies are delivering tools to update remotely**
- **Most applications will run with a server anyway**

Why Web Services?

Pro's

- Many more developers on the market can create a variety of applications quickly
- Less resource intensive for the MFP
- Easier to upgrade software and platform once on the server
- Web Services is getting the nod from OEM's more frequently vs. Java
- Although platforms are different it is easier to implement web services code from platform to platform in mixed environments

Con's

- If the server goes down, so does the application
- May increase Web traffic, more strain on servers

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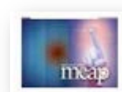
OEM Platform Foundations – Java Embedded

- **Canon – "**MEAP" (Multifunctional Embedded Application Platform) based around the Java or J2ME platform



- **Lexmark – "**eSF" (Embedded Solutions Framework) built on open standard Java Two Runtime Environment (J2RE)
- **Ricoh – "**ESA" (Embedded Software Architecture) based on embedded Java or J2ME
- **Samsung** – J-Scribe embedded-Java architecture developed by CCP and IBM

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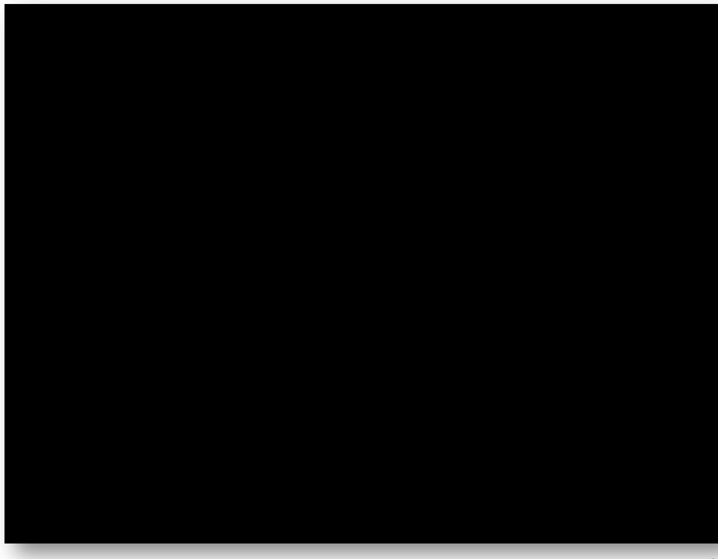
My MFP



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Solutions Staffing and Professional Services

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Office / Enterprise Staffing (1)

- **Sales Rep Competencies**
  - Articulate the Value Proposition
  - Recognize Opportunity
  - Establish Value
  - Present and Close Solutions Proposals
- **Training**
  - Vertical Market Issues
  - Software Overview
  - Sales Skills

Darrell Amy, Dealer Marketing Systems

Office / Enterprise Staffing (1)

- **Solutions Specialist Competencies**
  - Product Knowledge
    - Hardware/Software
  - Business Process Analysis
    - Print Optimization
    - Workflow Optimization
  - Solution Architecture
  - Project Management
    - Set and Manage Client Expectations
    - Statement of Work
    - Change Orders

Darrell Amy, Dealer Marketing Systems

Solutions Selling:
Document Professional Services (DPS)

- **A value-added strategic framework for competing in the marketplace**
- **A tactical engagement methodology that:**
  - Increases real and perceived value
  - Provides competitive differentiation
  - Increases the cost of separation
    - PS engagement becomes legacy system that outlives the MFP placement/lease
    - MFP upgrade becomes secondary and without competition
    - Own the IP address, own the document workflow
    - Generates richer transactions
- **Billable consulting, billable integration, project management, software maintenance, and services maintenance**

DPSs are infrequent, technical, or unique functions performed by independent contractors or consultants whose occupation is the rendering of such services. While not limited to licentiates (individuals holding professional licenses), the services are considered "professional" and the contract may run to partnerships, firms, or corporations as well as to individuals. The selection of an independent contractor or consultant providing professional services is usually based on skill, knowledge, reputation, and creativity. Price may be a secondary factor in the selection.

Wikipedia

Solutions Selling: GTM Strategy

- **Explore the opportunities beyond traditional "break/fix"**
- **Understand your customer's business**
- **Align your offerings (product, services, software) with your customer's business goals and initiatives**
- **Make your offerings relevant to *their* goals, not yours**
- **Address the pain in how they use documents in their organization**
- **Compliance – explore the impacts (hugely significant), follow the paper, find the pain**
- **Vendor to partner; commodity to solution**
- **Move up the value chain**

Solutions Selling: Components of a Successful Strategy

- **Ability to engage in long sales cycles**
- **Ability to sell to committees and work influencers and decision-makers**
- **IT competency**
- **Vertical market knowledge**
  - Reference accounts
- **Domain expertise**
- **Right partners**

A Focus on Document Assessments & MPS

Market Overview: Challenges for Business Users

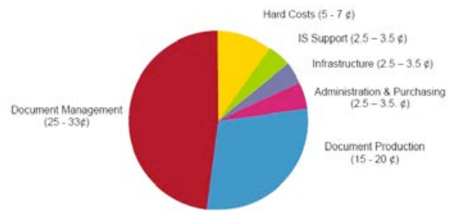
- **Device proliferation has led to higher output costs and complex fleet management issues**
  - 8.6 million copiers and 24.3 million workgroup printers currently installed in U.S. businesses
- **Fragmented purchasing procedures at fault**
  - IT buys printers and purchasing dept. buys copiers?
  - Individual workgroups use their own budgets for "under the radar" purchasing decisions
- **Color offers many benefits, but at what cost?**
- **Device capabilities have made impressive gains, but much of this potential is left untapped**

The Output Cost Problem

- **Over time, businesses can end up with a fragmented approach to buying office equipment and supplies, resulting in increased output costs and difficulty measuring total document costs**
- **Here are some tell-tale signs to look for:**
  - Lack of equipment/supplier standardization
  - No tracking of a firm's overall output spending
  - Supplies purchasing is decentralized and unmanaged
  - Use of personal desktop printers – especially ink-based devices – within workgroups
  - Color devices are unregulated – no permissions established or limits on run lengths

Factors Driving Assessments

Total Burdened Costs Per Page Range From .52 - .70



- Paper output volume continues to rise
- Print volume climbing up to 40%
- Copy and Faxing has become secondary
- Print Volumes are overtaking Copy Volumes
- Hard copy document devices are converging
- Color is becoming mainstream

According to an InfoTrends report – Assessing and Benchmarking Document Costs:

- Typically, only 10% of the office document burdened costs relate to equipment, supplies, and service expenses
- For every $1 spent on equipment, supplies, and service, another $9 is spent on other burdened costs that are not being exposed
- Typical business spends 6% of the annual revenues on documents – this includes hardware, paper, supplies and service

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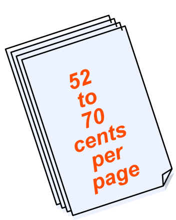
The Overall Office Document 'Cost Per Page'



Total burden cost of office output	*cents*	Office Cost Ratio
Visible Hard Costs – Hardware costs, toner & inks, paper (plain & special), click-charges, service and maintenance, power, telephone charges, etc.	5c to 7c	$1 Hard TCO
IS Support and Infrastructure – help desks, second level support, installation and setup, asset management, assessment, testing, local support staff, training, print servers, network connections, mainframe conversions, print formatting software, pre-processing equipment, etc.	5c to 7c	
Administration & Purchasing – product and services selection, internal requisitions, orders, billing, RFP's, storage, restocking, supplies service centers, inventory management, vendor relationship management, etc.	2.5c - 3.5c	
Document Production – End User production time and energy, futzing & waiting time, and intervention activity, hand finishing, walking to copiers, fax machine interaction, etc.	15c - 20c	$10 Process Costs
Document Management – the 'before and 'after' costs and processes, including filing, storage, indexing, microfiche, COLD, scanning (& not scanning), binding, folders, retrieval, postage, enveloping & distribution, mailroom, pre-printed forms, electronic forms, document creation, waste disposal, etc.	25c - 33c	

Source: EDAM ALL Associates Model

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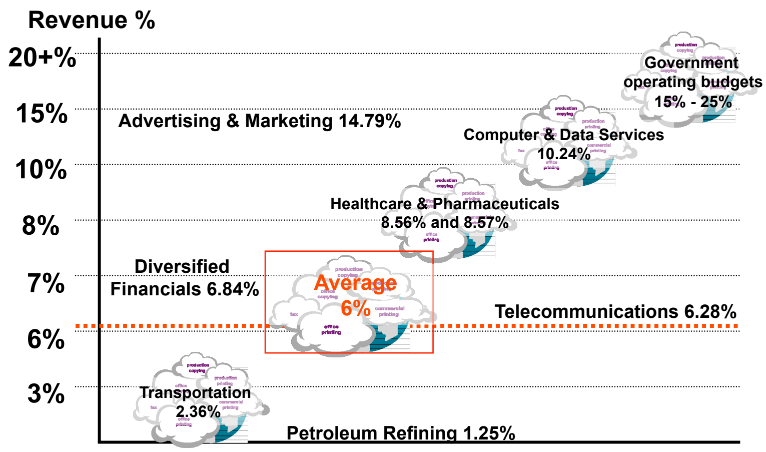
Industry sector spend - counting the entire spend – Commercial, Production and Office combined



Source: Examples taken from ALL Associates Group.
EDAM 2005 industry sector research

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Managed Print Services Opportunity

- **Move from capturing SOME pages to capturing *ALL* the pages**
- **Solutions – software automation and assessment tools drive the managed services model – Software Revenue**
  - Tools – Device Discovery, Device/Driver Management, Meter Reading, DRM Service Solutions (M2M), Assessment Calculators, Rules Based Printing, Cost Accounting
- **There are professional services such as consulting and installation potential – Professional Services Revenue**
  - Project Consulting, Project Management, Solutions Installation, Fleet optimization consulting, Support/Service, Solutions Maintenance – Complete Managed Services

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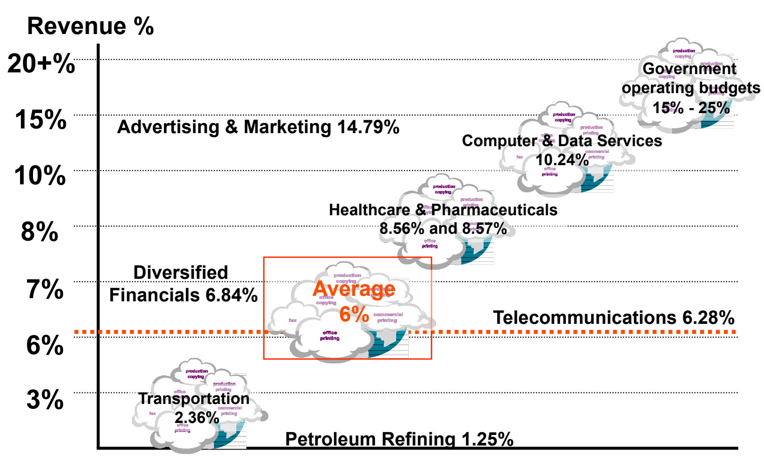
An Perfect Storm is Rising for MPS

- Copier/A3 vendors are moving into the A4 space by delivering A4 MFP and Printer centric devices
- Printer/A4 vendors are moving into the A3 space by delivering A3 MFP and Printer centric devices
- All vendors want to offer a balanced deployment strategy to be a one stop shop for their customers
- A big threat to A3 manufacturers is from A4 devices capturing A3 pages in a balanced deployment
- Managed Print Services capture all the pages, aftermarket and services for these devices

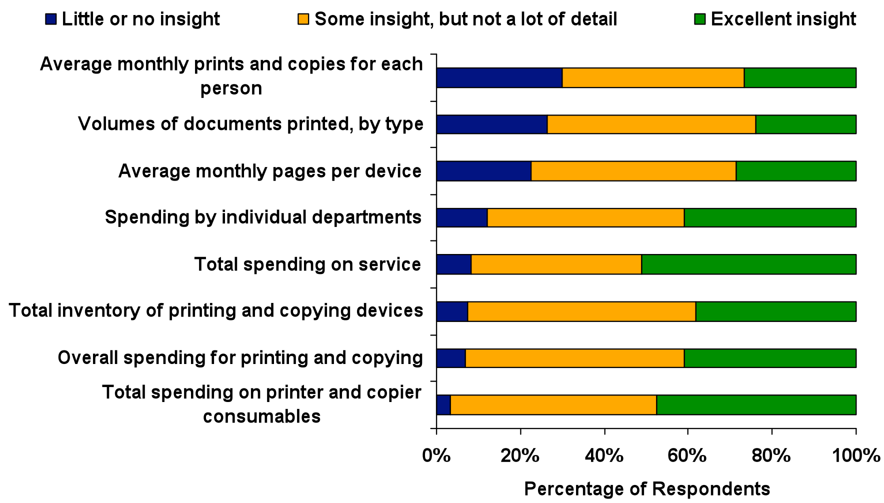
Industry sector spend - counting the entire spend – Commercial, Production and Office combined



Source: Examples taken from ALL Associates Group.
EDAM 2005 industry sector research

Management Knowledge of their Document Output

Please rate what you think your management knows ALREADY about printing, copying, faxing at your site.



N = 147 Respondents have considered performing document assessments

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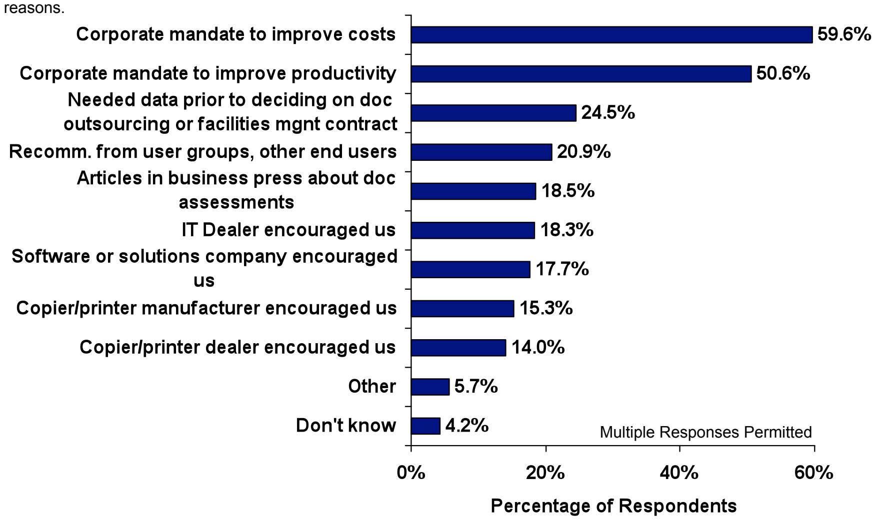
Influences Company Considered for Doing Document Assessment

What influences do you think caused your company to consider doing a document assessment? Please check the top THREE reasons.



N = 530

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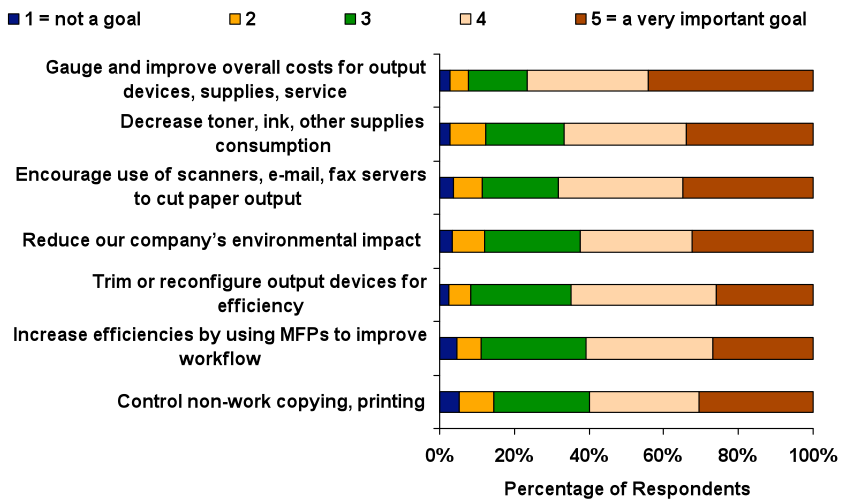
Rate of Goals for Document Assessment (1)

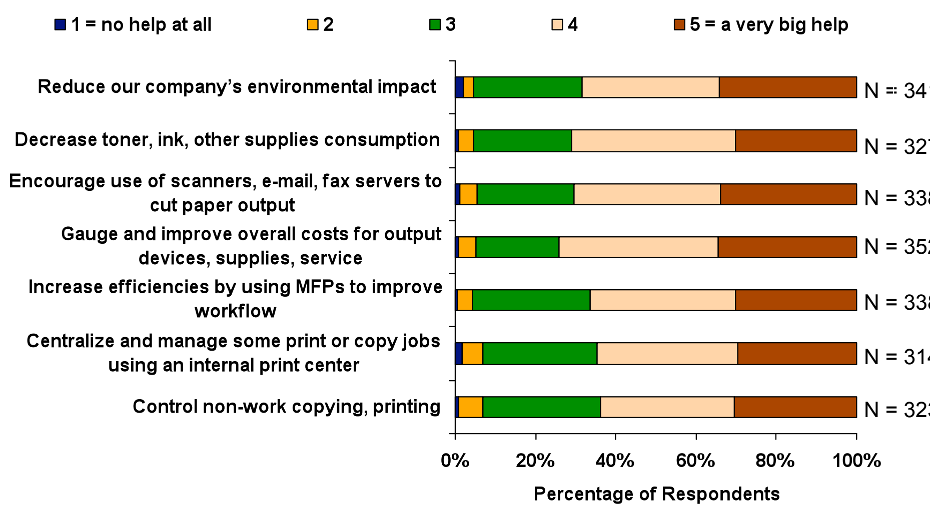
Please rate the following as possible goals for your company's document assessment:



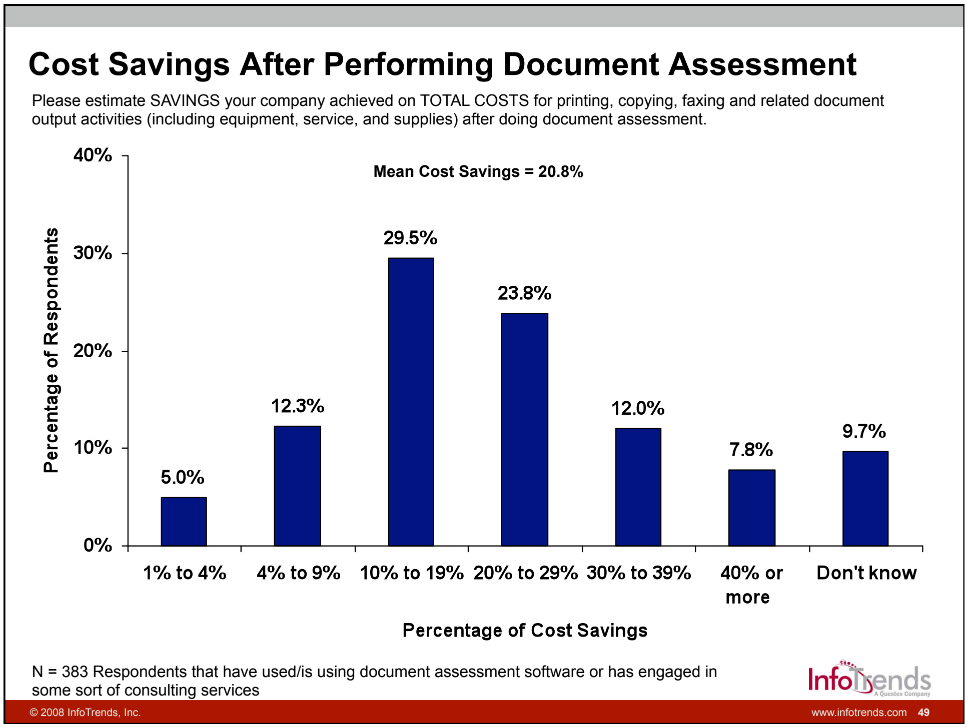
N = 530

Rate of How Well Document Assessment Met Goals (1)

Please rate how well your company's document assessment met the goals you cited earlier:



Respondents that have used/is using document assessment software or has engaged in some sort of consulting services


Cost Savings After Performing Document Assessment
Please estimate SAVINGS your company achieved on TOTAL COSTS for printing, copying, faxing and related document output activities (including equipment, service, and supplies) after doing document assessment.
Mean Cost Savings = 20.8%
Percentage of Respondents
40%
30%
20%
10%
0%
5.0%
12.3%
29.5%
23.8%
12.0%
7.8%
9.7%
1% to 4%
4% to 9%
10% to 19%
20% to 29%
30% to 39%
40% or more
Don't know
Percentage of Cost Savings
N = 383 Respondents that have used/is using document assessment software or has engaged in some sort of consulting services
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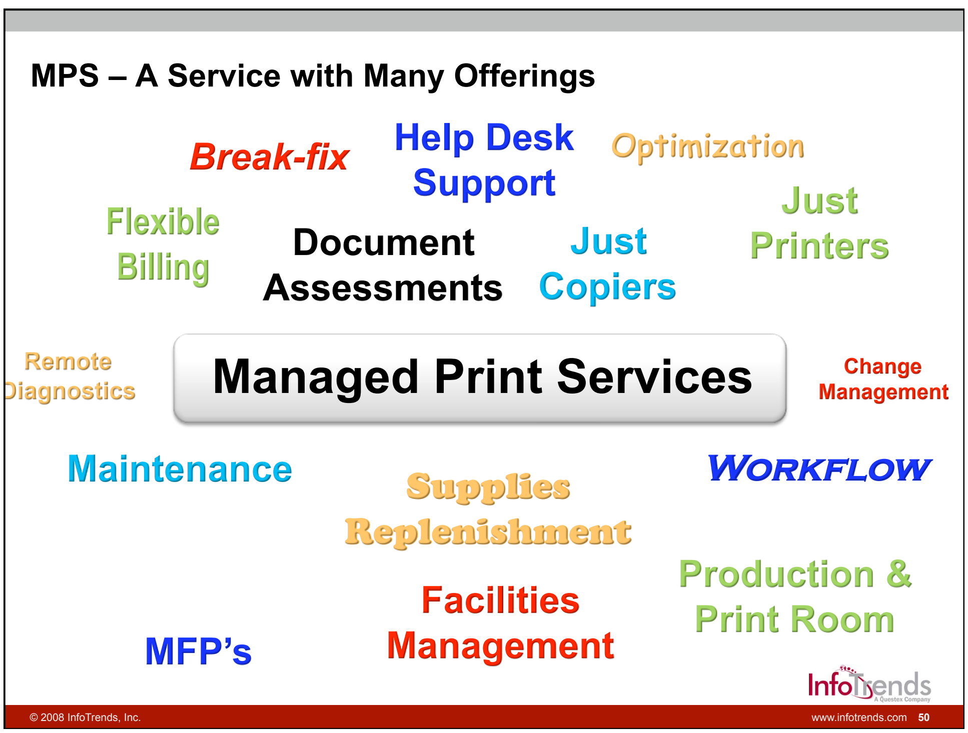
MPS – A Service with Many Offerings
Break-fix
Help Desk Support
Optimization
Flexible Billing
Document Assessments
Just Copiers
Just Printers
Remote Diagnostics
Managed Print Services
Change Management
Maintenance
Supplies Replenishment
Workflow
Production & Print Room
Facilities Management
MFP's
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InfoTrends Definition of a TRUE Managed Print Service

- *Contracted 3rd party on-going services that promote the uptime, maintenance and support of ALL of an organization's Copy And Print environment*
- *These services traditionally consist of the management all hardware, software, networking, break fix service, maintenance and supplies, parts and fleet optimization.*
- *Other services may include Solutions and Workflow Optimization Services as well as complete outsourcing of the copying and print environment*
- *These services may be on or off site or a combination of both*
- *The consolidation of one vendor would allow for the ease of management and billing from ONE provider as well as improved costs from optimizing the infrastructure and administration*

MPS Engagement Components

- Assessment Services
- Optimization Services
- Supplies Replenishment – Copiers/Printers and Competitive products
- Help Desk Services
- Multi-vendor Break-fix service
- Flexible Billing Options
- Remote Diagnostics
- Change Management Services
- Environmental Management Services
- Workflow Improvement Services

Optional Services

Managed Services Challenges

- Many vendors offering a variety of disparate MPS offerings
- Service levels and capabilities are also confusing
- Pricing can be deceiving – some are included in lease base some are included in click, etc
- Some offer a variety of supplies and products including refurbished products (supplies and hardware) to lower costs
- Variety of vendors offering some type of Managed IT Services or Managed Print Services that complicated and confuse the market
  - Copier OEM's, Printer OEM's, IT/VAR/SI Resellers, Copier Dealers, 3rd Party Supplies Manufacturers, Computer Superstores, Office Supplies Resellers, Facilities Managers, Consultants, Professional Service Organizations
  - Who is able to address MPS best?

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Dealer Channel Survey on Solutions

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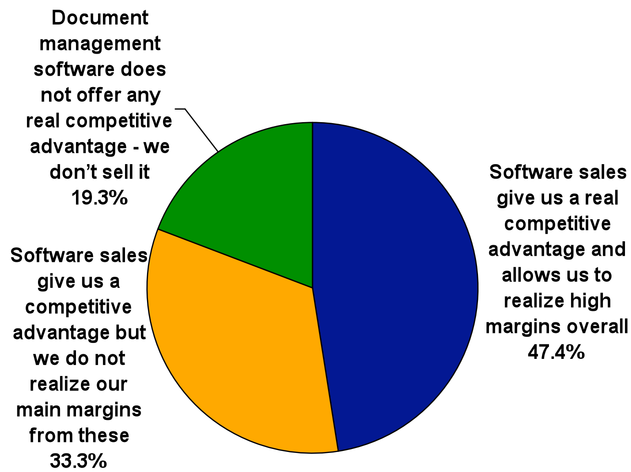
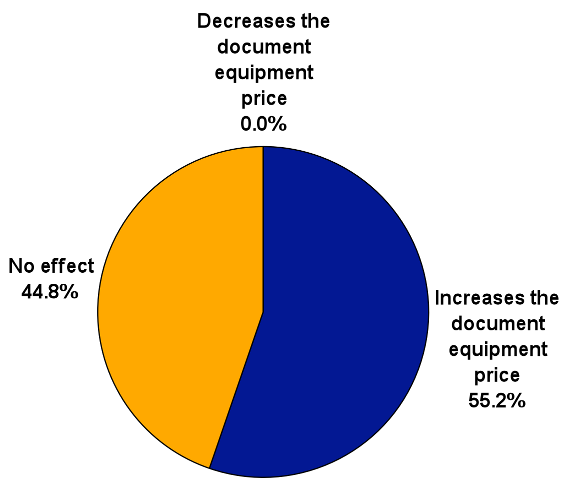
View on Selling Document Solutions Software

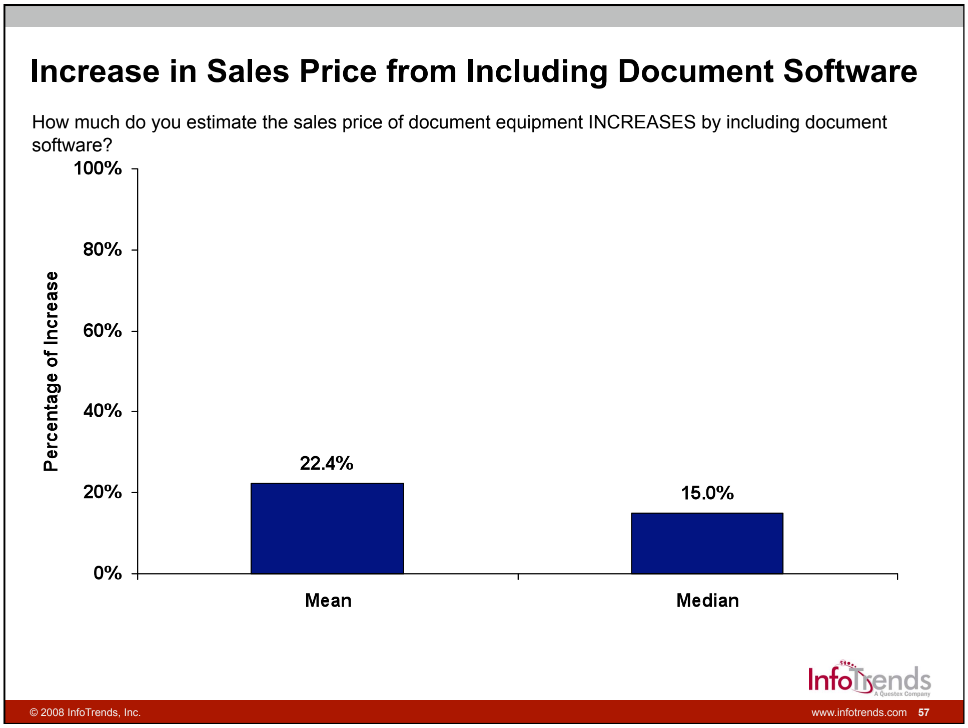
Which of the following best reflect your view on selling document solutions software?



Effect of Including Document Software with Equipment

What effect does including document software have on the sales price of document equipment compared with transactions that do not include document software?




Increase in Sales Price from Including Document Software
How much do you estimate the sales price of document equipment INCREASES by including document software?
Percentage of Increase
100%
80%
60%
40%
20%
0%
22.4%
15.0%
Mean
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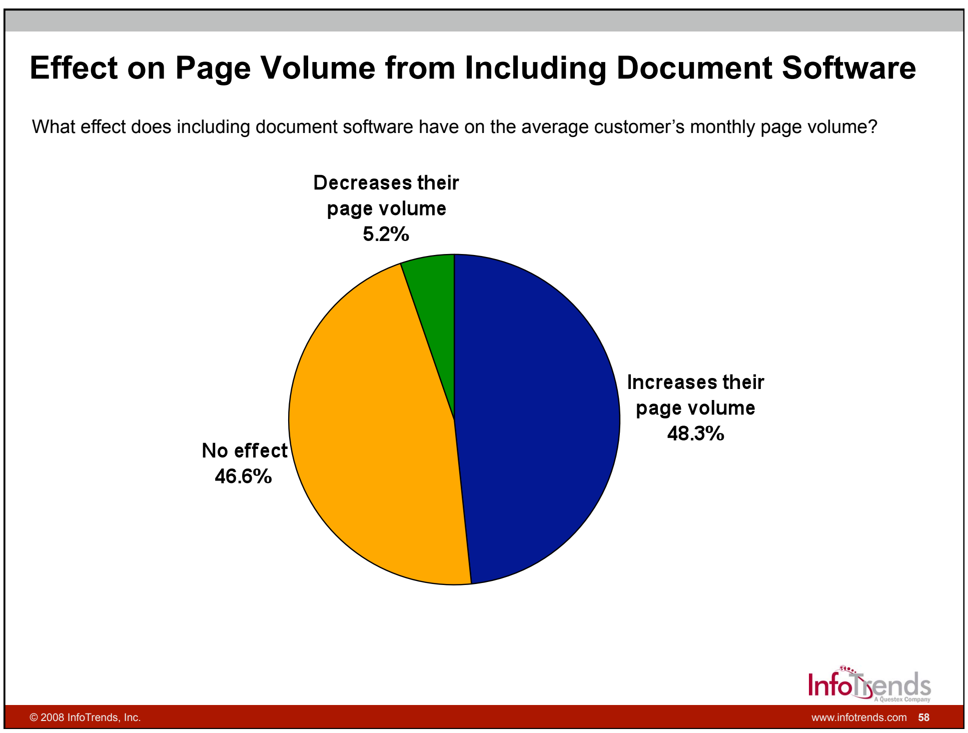
Effect on Page Volume from Including Document Software
What effect does including document software have on the average customer's monthly page volume?
Decreases their page volume 5.2%
Increases their page volume 48.3%
No effect 46.6%
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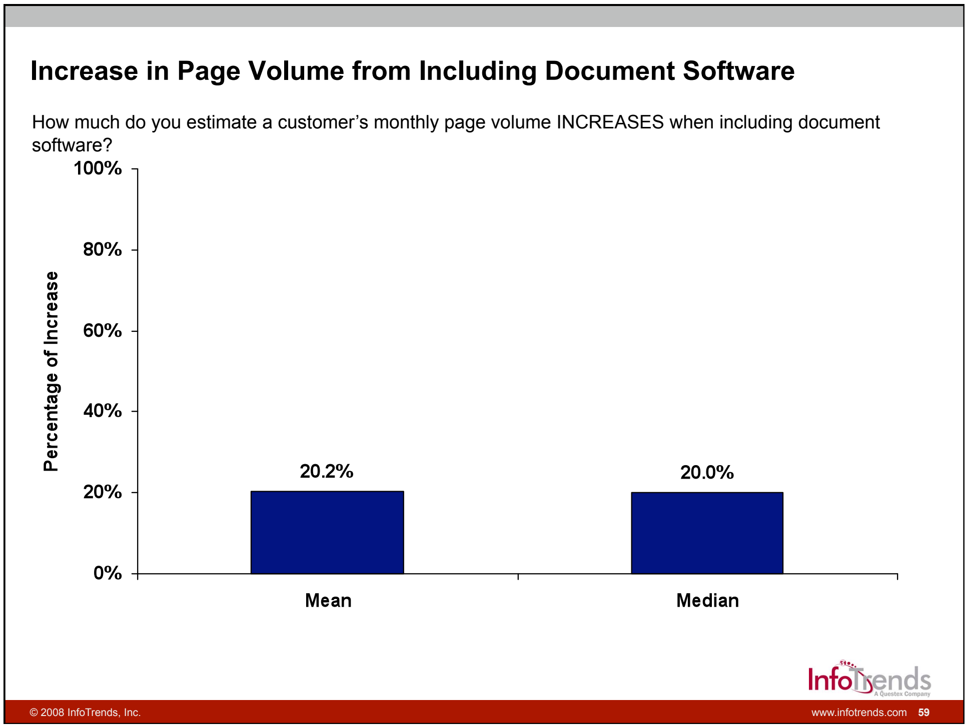

Increase in Page Volume from Including Document Software
How much do you estimate a customer's monthly page volume INCREASES when including document software?
Percentage of Increase
100%
80%
60%
40%
20%
0%
20.2%
20.0%
Mean
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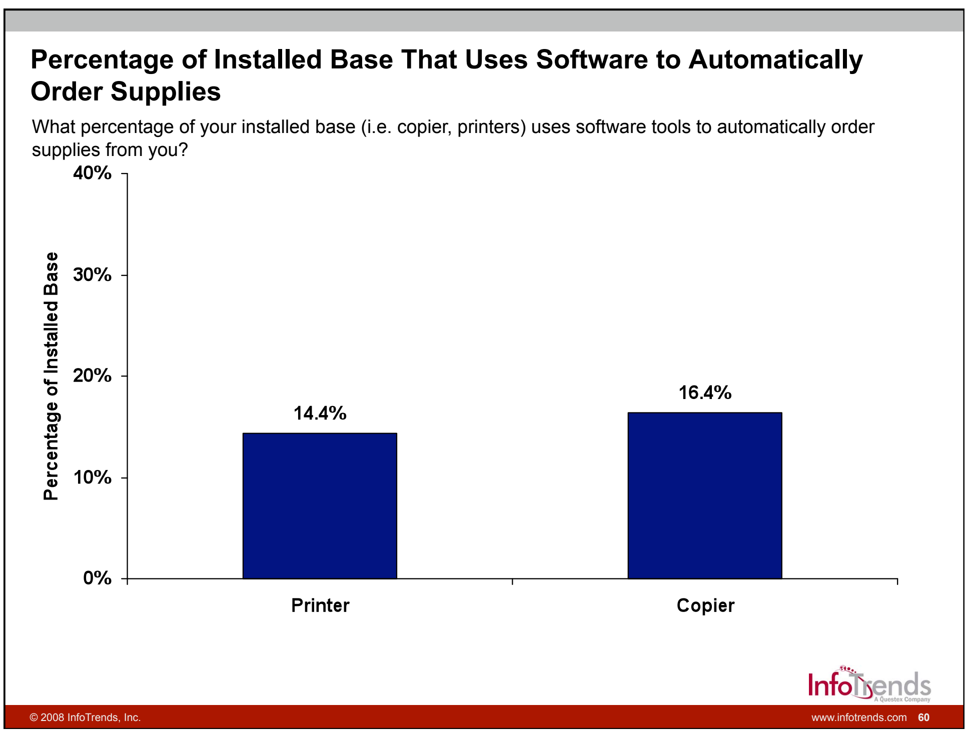

Percentage of Installed Base That Uses Software to Automatically Order Supplies
What percentage of your installed base (i.e. copier, printers) uses software tools to automatically order supplies from you?
Percentage of Installed Base
40%
30%
20%
10%
0%
14.4%
16.4%
Printer
Copier
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Top Initiatives Company is Pursuing to Grow business?

What are the top initiatives your company is pursuing to grow your business?

- **Software and solutions was the most frequent response by far**
  - **Document Management Software had highest number of responses**
  - **Managed Print Services had almost as many responses**
  - **No clear third choice, remaining responses covered a broad range of strategies**

Conclusions

- **The name of the game is capturing more (or all) pages and this can be done by capturing all machines – Greater MIF = Greater Pages**
- **Solutions & Services have more "Staying Power" within an organization - Managed Services & Workflow**
  - It is much harder to replace a customized solution than hardware and it also makes it harder for the competition to break into your customers
  - It is about solving customer problems, improving a process or creating new business opportunities for your customers
- **MPS & Solutions sales generate or pull significant hardware & supplies revenue**
- **Building a Solutions Ecosystem is just as important as building your solutions partnerships – Then Execution is Key**
- **Keep your solutions sales story simple with a path to grow a solutions strategy within a customer's environment – Start with Assessment Services**

"Certainly one of those areas that we think is just huge for you, huge for us is this context of document solutions and services. And everybody talks about solutions. We know that it's a better word, by the way, then commodity or undifferentiated or procurement. So now we just have to make sure that solutions have clout.

And, InfoTrends has a really powerful definition of it, "A solution is a set of software and services often accompanied by hardware that solves a business problem, or improves a process, or creates a new business opportunity for a customer."

I like that… I think that if you solve a problem for me, you make my life easier. If you improve a process, you make it more predictable. And, if you create an opportunity for me, you make my business more profitable;… easier… more predictable… more profitable. I think that's something that customers are willing to pay for. They are a lot more willing to pay for that than they are for speeds and feeds. And I think it is tougher for a competitor to match. So that's why this solutions business, which certainly includes all the service and support that goes along with it, is expected to be about a $1.4B industry by 2009…"

Anne Mulcahy
Xerox Ignite Partner Summit 2007

European
Office Document
Technology Forum
9/17/2008 – 9/18/2008
Dublin, Ireland

US
Office Document
Strategy Forum
11/12/2008 – 11/13/2008
Mahwah, NJ

randy_dazo@infotrends.com

jon_reardon@infotrends.com