BTA Southeast Spring 2013

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Services-led, Technology-enabled: The Road Ahead

February 8, 2013

Ricoh Americas Corporation

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Welcome

Martin Brodigan
Chairman and CEO
Ricoh Americas Corporation

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Do you need to change?

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Changing Information Environment

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The "Perfect Storm" of Technology, People, and Process…

Technology Impact

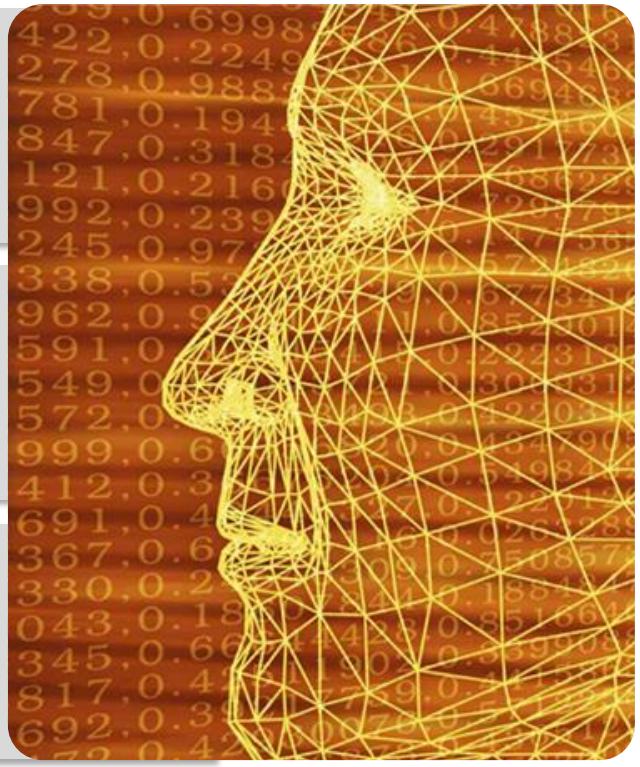
The arrival of tablet technology allowing users to interact with digital documents as paper and cloud-based applications supporting individual workflow needs

Work Style Shift

Three unique generations in workforce that consume information differently

Organizational Behavior Shift

Actions to downsize real-estate and minimize IT spend create greater challenges to address the results of the "Perfect Storm"



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Unprecedented Adoption

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25 billionth app was downloaded in 2012

2012

122.3MM

2013

172.4MM

2016

282.7MM

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Where the Industry is Going

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- The affect is greater than first predicted, with the firm's new 'Tablet Demand and Disruption' survey showing that **corporate printing has declined by 16%** due to both tablet adoption and company measures to curtail printing (*Morgan Stanley*)
  - Survey of 700 U.S tablet users reveals: 46% now print less and 41% argued that **printing less was a "main benefit" of tablet adoption**
- The **worldwide mobile worker** population is set to **increase to 1.19 billion in 2013**, accounting for 34.9% of the workforce. The **U.S.** will remain the most highly concentrated market for **mobile workers with 75% of the workforce** being mobile by 2013 (*IDC*)
- The average mobile worker carries 3.5 devices (*Forbes*)
- Employers are now **actively promoting the expansion of their mobile workforce** and technology is enabling continuous communication with employees outside
  of the office (*Telework Coalition*)
  - 89 of the top 100 U.S. companies offer telecommuting
  - More than half **(58%) of companies** consider themselves a **virtual workplace**
  - only 9% of employees worked at headquarters
  - **67% of all workers used mobile and wireless computing**

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Generational Behavior Changes

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Baby Boomers

- Born post WWII – early 1960's
- ***Believes personal face-to-face interaction as highest level of service***
- Will likely exit the workplace by 2021; significant experiential knowledge will leave with them
- Typically a contrarian point of view on the long-term viability of technology which they interpret to suggest human knowledge and skills become less valuable than a "computer"
- Will oppose change with a vengeance if they are asked to work differently
- Transacts limited personal business on line

Gen "X"

- Born between mid-1960's to early 1980's
- ***Relies heavily on phone for customer service needs. Less reliant on face-to-face support***
- Transitioning into (or currently in) position of decision making
- Understands change and is not opposed to it
- Requires significant proof before accepting new ideas or concepts
- "Latch-key " generation with degrading family structure creates less confidence in formal infrastructure
- First generation to have PCs

Gen "Y"

- Born early 1980's
- ***Prefer the use of digital information and technology***
- Will represent more than 50% of the workforce in less than three years.
- Very team oriented with less focus on personal recognition
- Defining the use of text, chat and social media as primary communication medium
- Transacts all personal business on line and sees immediate accessibility and ability to self-serve as highest level of service
- First generation to have internet since kindergarten

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Change Brings Opportunity

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Leveraging lessons of the past:

- B&W to Color
- Analog to Digital

Those businesses that seized opportunities didn't only survive, ***they flourished.***

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Understand Your Current/ Potential Customers

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Vertical Markets

Government / Commercial

Number of Employees

Number of Locations

Understand your customers' business problems. What are the opportunities to add value?

Becoming a Trusted Advisor

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Already have it

Hire

Partner

Acquire

Understand your existing knowledge base / resources.

Trusting Your Partner

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CHAMPS

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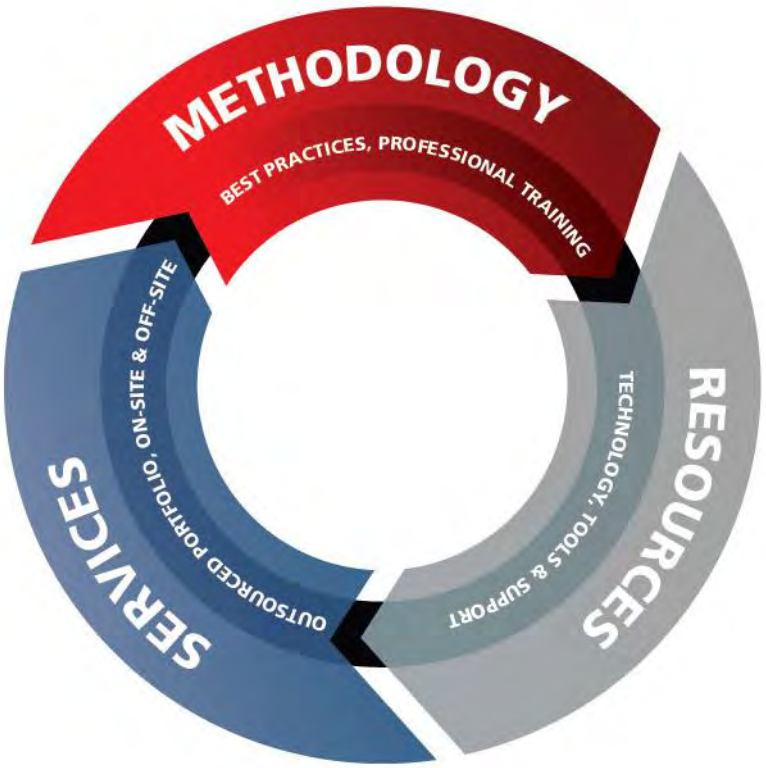
Components

- Proven Methodology
- Best Practices, Professional Training
- Best-in-Class Resources
- Technology, Tools and Support
- Industry Leading Services
- Outsourced Portfolio
- On-site and Off-site Services Available



CHAMPS | Ricoh Services for Dealers

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Successful Partnerships

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As a Certified dealer, Thermocopy has direct access to the Ricoh Solution Consultant resources in their area for collaboration on IT Services opportunities.

- J Mark DeNicola, CFO, Exec Dir Sales & Marketing

THERMOCOPY

Trained and dedicated sales resources to CIS; focused on building strong services pipeline. Worked together on a major back-file conversion opportunity in healthcare.

- Cindy Moyer, Principal

Edwards Business Systems

First dealer to become Ricoh Certified in IT and PS Services. First to capture a sale in all three CHAMPS services: IT Services, Professional Services, and Commercial Imaging Services.

- Chap Breard, Owner

MOEbiz
Business in MOEtion

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Assessing Operational Support

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- Administration Systems
- Billing
- Monitoring
- Compensation

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Building Your New Value Prop

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Customer-focused Solutions:

A combination of products, services and intellectual property — focused on a specific business problem — that drives measurable business value.

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QUESTIONS?

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