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Diversification, Operational Improvements & Sales Enablement

September 2022



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Looking Back – @ 2019

2020
BRINGS
UNCERTAINTY



3

3

U.S. ELECTIONS
BREXIT
CHINA TARIFFS
RECESSION??

4

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2020
COVID

5

5

2021
COVID

6

6

SUPPLY CHAIN HYBRID SALES RESOURCES RECESSION??

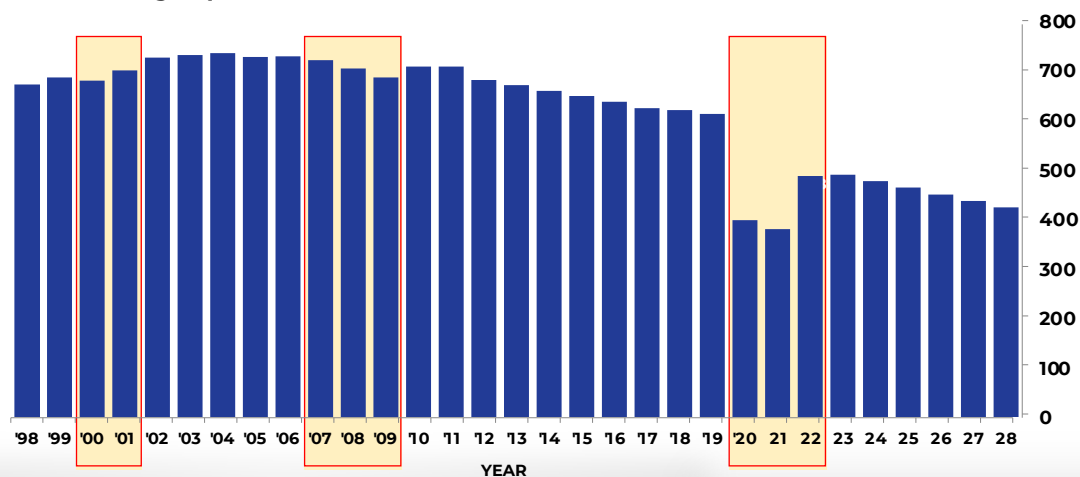
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Office Environment Page Volume

■ Total Office Pages (Billions of...)

■ Economic recession

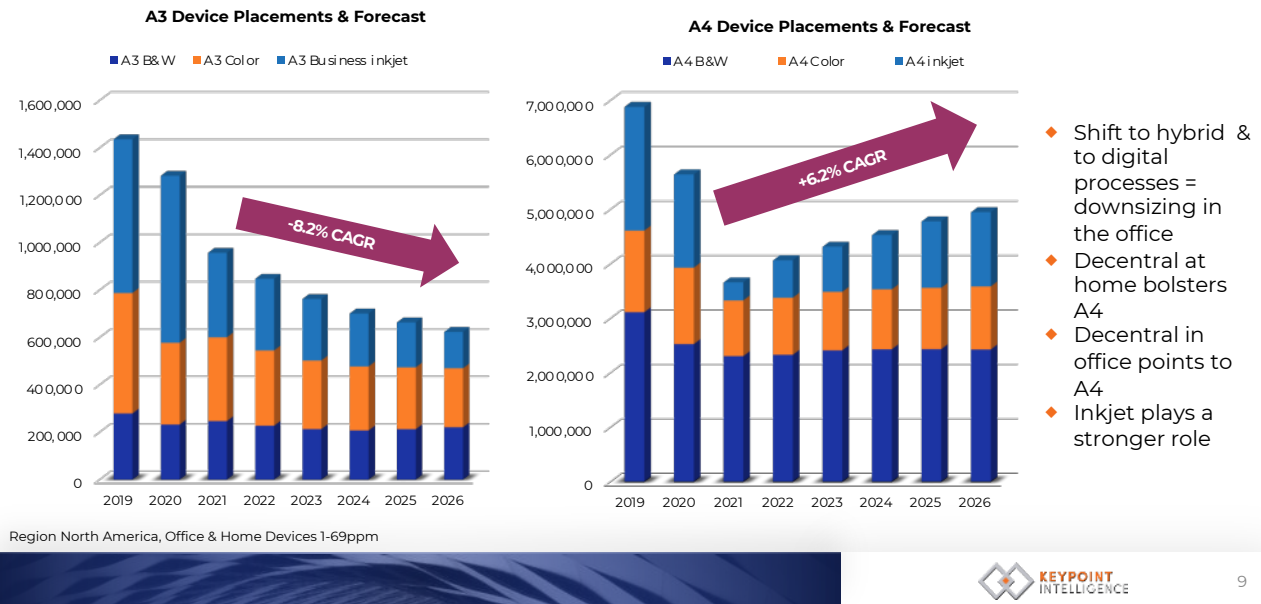


KEYPOINT
INTELLIGENCE

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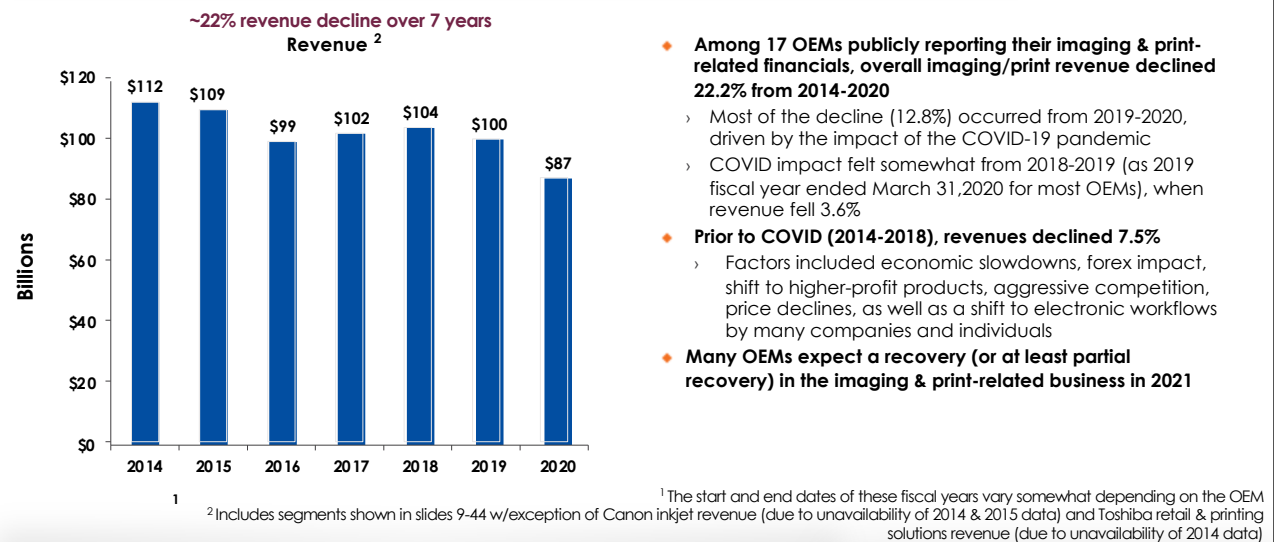
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What Hybrid Working Is Doing to Print in the Office: A3 vs. A4



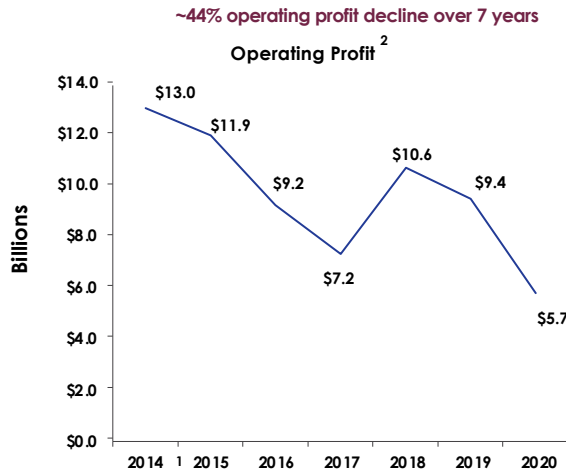
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Overall Industry Health as Reflected by Revenue



10

Overall Industry Health as Reflected by Operating Profit



- Among 16 OEMs publicly reporting their imaging & print-related financials, overall imaging/print operating profit declined 43.6% from 2014-2020

- Most of the decline (39.4%) occurred from 2019-2020, driven by the impact of the COVID-19 pandemic
- COVID's impact was felt somewhat from 2018-2019 (as 2019 fiscal year ended March 31, 2020 for most OEMs), when operating profit fell 11.4%

- Prior to COVID, revenues declined 44.2% from 2014-2017 before increasing 46.8% from 2017-2018

- Decline impacted by structural reform expenses, other higher costs (e.g., goods, sales), price declines, lower sales volume, and impairment charges
- Growth driven by improved sales and effects of restructuring

- Many OEMs expect a recovery (or at least partial recovery) in the imaging & print-related business in 2021

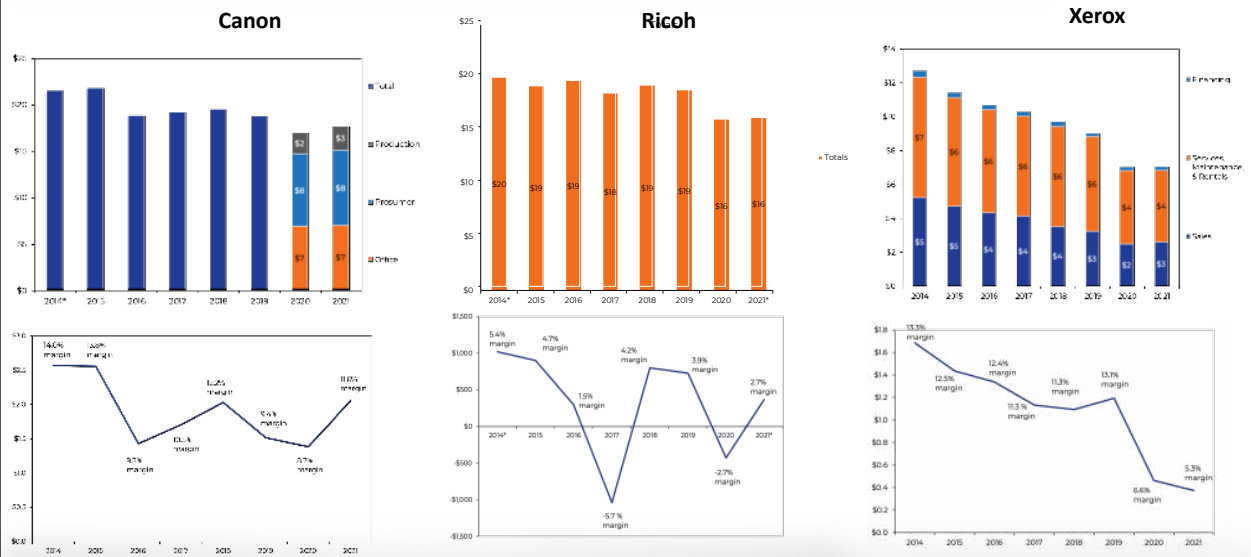
¹The start and end dates of these fiscal years vary somewhat depending on the OEM
²Includes segments shown in slides 9-44 w/exception of Canon inkjet revenue (due to unavailability of 2014 & 2015 data), Toshiba retail & printing solutions revenue (due to unavailability of 2014 data)



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11

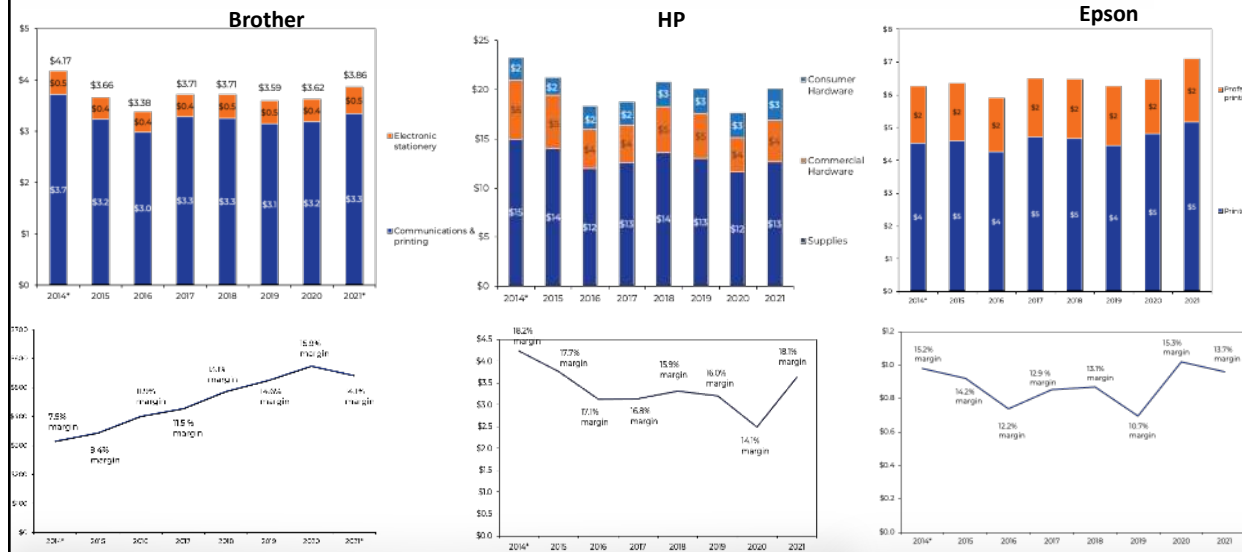
CRX Global Historical Revenues (in \$Bn) & Margins



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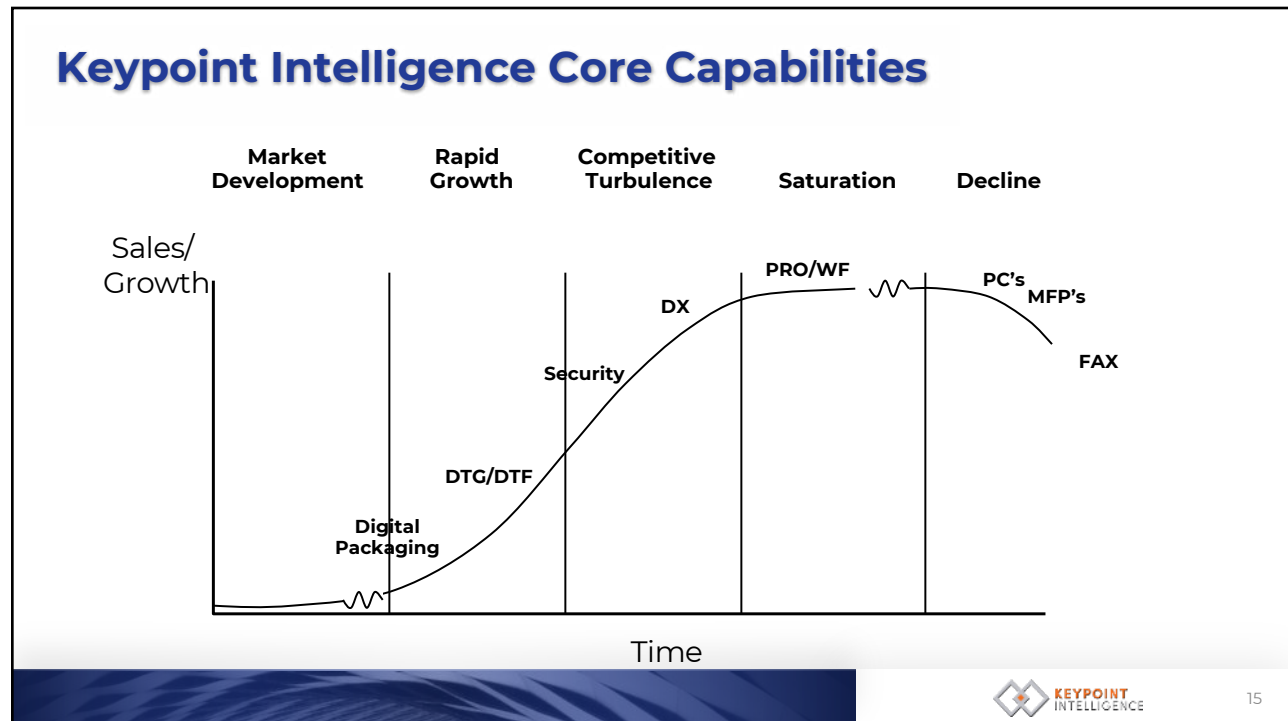
Brother, Epson, HP Global Revenues (in \$Bn) & Margins



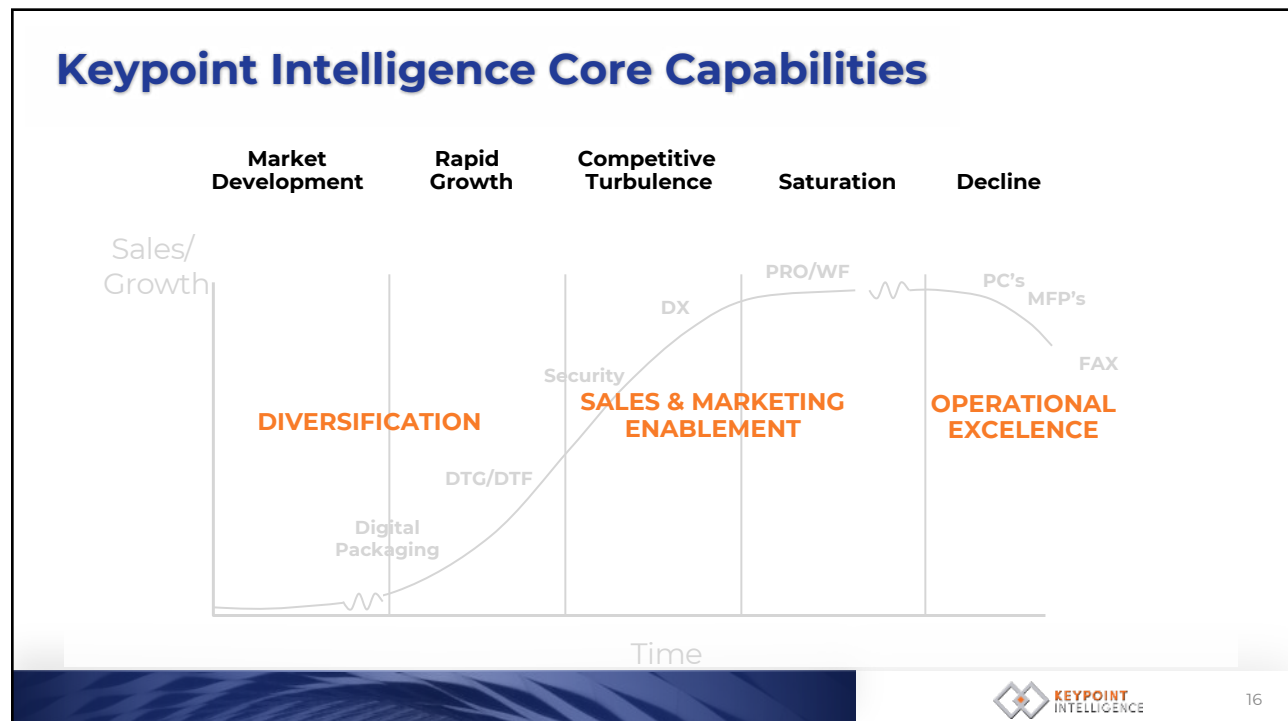
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HYBRID
DIGITAL TRANSFORMATION
eCOMMERCE
DIVERSIFICATION

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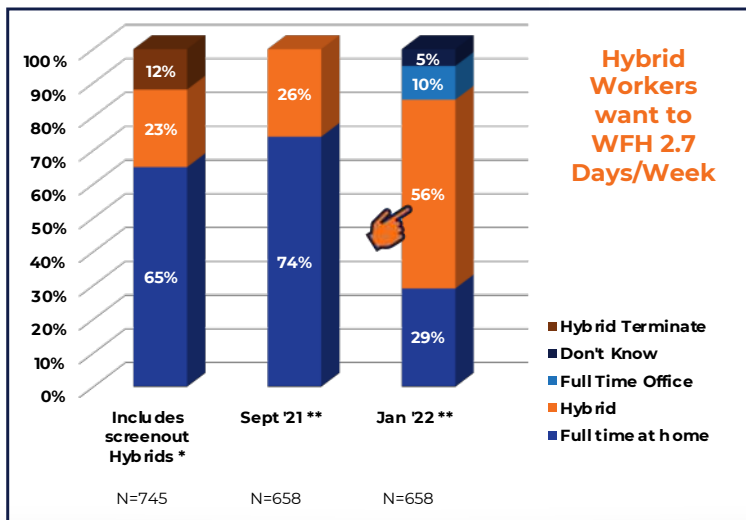


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The New Style of WORK is a hybrid of OFFICE & HOME

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The Disconnect on Hybrid



52%
of workers are considering
going hybrid or remote in the
year ahead**

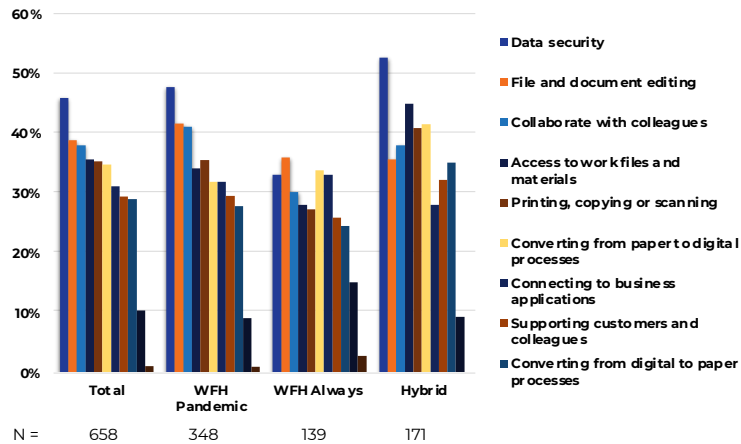
HOWEVER

50%
of leaders said their company
requires or plans to require full-
time, in person work in the year
ahead

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Hybrid Working is in Infancy

Q49: What business challenges do you find cost the most time whilst working from home?



Source: Keypoint Intelligence 2021 Future of Office Survey US Edition

38%

of hybrid workers said "knowing when to come into the office" as their biggest challenge*

43%

of remote workers don't feel included in meetings*

43%

of leaders say relationship building is the greatest challenge in remote and hybrid working*

*Microsoft Work Trend Index 2022



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DIVERSIFICATION
is a necessity for
SURVIVAL



20

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SECURITY

continues to be the

NUMBER ONE

focus for businesses



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Cybersecurity is THE Top Area they Outsource

- ◆ Cybersecurity is the top operational concern
 - ◆ Mentioned as a top challenge by every respondent
- ◆ Every respondent mentioned they outsource at least one area of cybersecurity
 - ◆ Services sought: Penetration testing/risk assessments, intrusion detection, Security Operations Center, vCISO, network/endpoint monitoring/management, email security/phishing-scam training
- ◆ Reasons for outsourcing cybersecurity:
 - ◆ Lack of in-house expertise
 - ◆ Too expensive to hire and/or too hard to find security experts
 - ◆ Not enough work to justify full-time cybersecurity staff
 - ◆ Dedicated experts can do it better/be more focused on that one area



Image credit: istockphoto.com/rscyth5



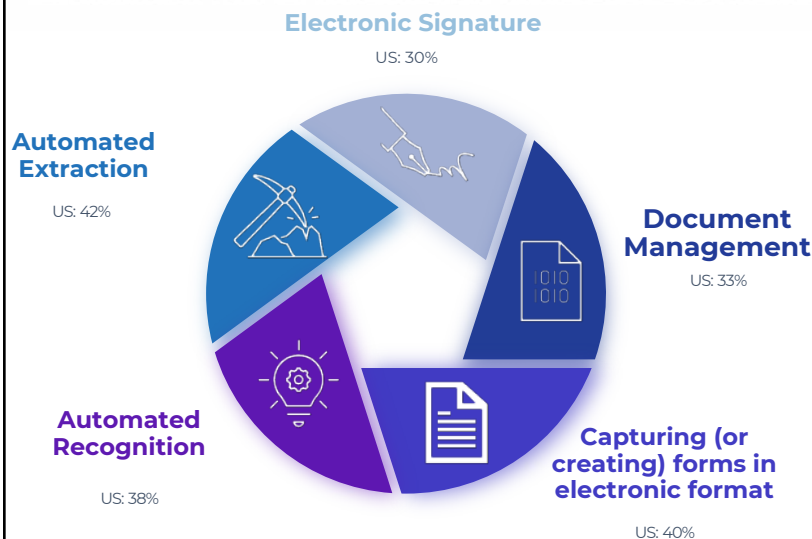
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ORGANIZATIONS are advancing their DIGITAL TRANSFORMATION strategies

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Demand for Document and Data Solutions is Heating Up



THE KEY POINT

- ♦ ITDMs expect to be investing in a variety of document solutions in 2022
- ♦ Automation is a key focus
- ♦ 9/10 expect investment in scanner and document workflow technologies to increase
- ♦ Business size dictates specific needs
- ♦ Medium and large businesses are more likely to invest in automation than small businesses
- ♦ Small businesses are more likely to invest in doc management than medium and large business.

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Creating Easy, Equitable, Immersive Meeting Experiences

43%

of remote workers don't feel included in meetings*

50+%

Of meetings don't start on time because of technology challenges



Remote workers feel unheard, unseen, and uninvolved in meetings.

HP Presence



Sharp Synappx



Canon AMLOS



Sennheiser TeamConnect Ceiling 2



*Microsoft Work Trend Index 2022
**Sharp and Spiceworks joint survey

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25

SALES ENABLEMENT
and
OPERATIONAL EXCELLENCE.
improve revenue and margins



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Multi-media Engagement Experience

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Preview

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Dealers are Facing New Challenges



COVID has changed the entire landscape of our industry

- ◆ New sales recruiting and hiring challenges
- ◆ Supply chain issues
- ◆ Knowledge workers continue to work from home
- ◆ Face to Face engagement opportunities have become more challenging



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B2B Buyers are Changing

They are more ...

- ♦ Digitally-oriented – millennials are the new purchasers
- ♦ Information-seeking
- ♦ Self-directed for purchasing

69% of B2B buyers prefer digital when ordering

80% of the education, during a purchasing decision, is performed before talking to a salesperson **80%**



B2B eCommerce Statistics

\$1.6T In 2021, online sales on B2B ecommerce sites, log-in portals and marketplaces increased 17.8% to \$1.63 trillion

- Digital Commerce 360

65% of B2B companies across industries are fully transacting online in 2022. And for the first time, B2Bs are more likely to offer ecommerce over in-person sales.

- McKinsey & Company

65%

\$4.6T The North American B2B ecommerce market will surpass \$4,600 billion by 2025

- Statista

18% of B2Bs' revenue is coming directly from ecommerce. Higher than phone, email and video conferencing.

- McKinsey & Company

18%



eCommerce Exposure

Let's find the perfect device for you!

Start typing the manufacturer or model name of the product you are looking for.

PRODUCT CATALOG SERVICES BLOG ABOUT CONTACT

Printer/MFP Toner

Need a little help? Try our Intelligent Product Wizard. [Try it now](#)

Product Showcase

Remove Filters

Sort by: Mono speed (Low to High)

Brands:

- ☐ Brother
- ☒ Canon
- ☐ Epson
- ☐ HP
- ☐ Konica Minolta
- ☐ KYOCERA
- ☐ Lexmark
- ☐ Ricoh
- ☒ Sharp
- ☐ Toshiba

Type Of Device:

- ☐ Multi-Function Printer
- ☐ Single-Function Printer
- ☐ Wide-Format
- ☐ Production

Speed:

Compare

Configure

Compare

Add to cart

Compare

Configure

Compare

Request a quote

KEYPOINT INTELLIGENCE

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Q & A


KEYPOINT INTELLIGENCE

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THANK YOU

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