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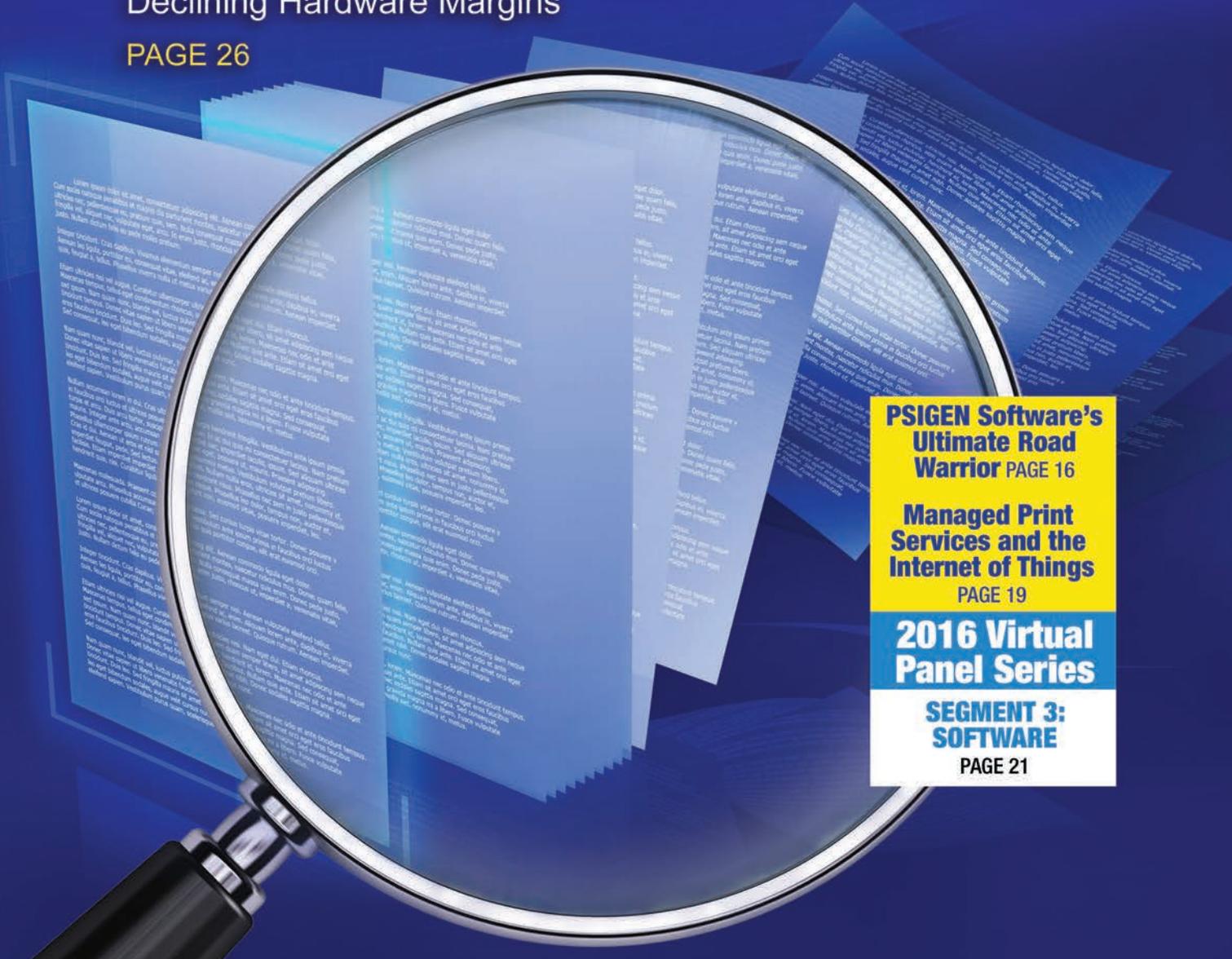
REPORT

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Making a Case for Capture

Document Input Solutions Expand MFP Function and Sophistication to Offset Declining Hardware Margins

PAGE 26

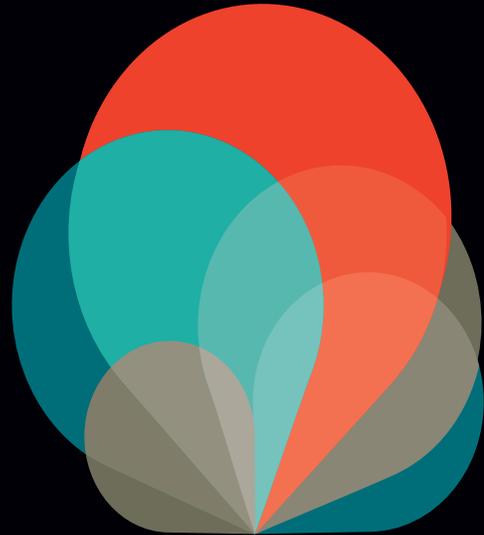


PSIGEN Software's Ultimate Road Warrior PAGE 16

Managed Print Services and the Internet of Things PAGE 19

2016 Virtual Panel Series
SEGMENT 3: SOFTWARE
PAGE 21

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This Month

COVER STORY

26 | Making a Case for Capture
Document Input Solutions Expand MFP Function and Sophistication to Offset Declining Hardware Margins

FEATURES

14 | History Lesson
Rick Taylor, the Latest in Select Group of American Executives to Serve as Officer of Japanese Parent Company

15 | Principal Panels
Discussions at SDG's Winter Owners Meeting and ITEX 2016 Emphasize Key Software and Wide-Format Opportunities for Dealers

16 | PSIGEN Software's Ultimate Road Warrior
President and Official Spokesperson Glenn Johnson Powers through Ongoing Battle to Enhance Company Profile

19 | Managed Print Services and the Internet of Things
The Relationship is Leaving Its Mark on the Document Imaging Industry

31 | Social Media Frenzy
Dealers Leverage New and Critical Platforms to Expand Brand Awareness in a Digital World

DEPARTMENTS

6 | Hard Copy • From the Editor's Desk
No. 22: Running with the Software Programs
After Touting Software for More Than a Decade, There Is Still Much to Learn



Industry Awards, Acknowledgments & Sightings

8 • Drupa 2016 Estimated to Draw 300,000 Global Attendees

8 • Visual Edge Technology Acquires Imaging Solutions

10 • Continuum University Issues 1,000 Specialty Certifications in Help Desk

*"We're all excited
But we don't know why
Maybe be it's 'cause
We're all gonna die*



*And when we do
What's it all for?
Better live now
before the grim reaper comes knocking
on your door..."*

– Prince (1958–2016)

American singer, songwriter, multi-instrumentalist, record producer and actor; lyrics from "Let's Go Crazy", originally released on the Warner Bros. LP "Purple Rain" ©1984

12 | Japanese Headlines

Wordwide Electro-Graphic Downturn Core Imaging Device Segment Declines; Experts Predict Increases by 2018

21 | 2016 Virtual Panel Series Segment 3: Software

As the Importance of Software Increases, Dealers Struggle with Adopting Apt Partners

38 | Women Influencers

Valerie Briseno
A Positive Force Behind the BTA

42 | On the Road

Note the addition of Canon Road Show 2016 stops and date change for GreatAmerica Sales Simplicity seminars.

42 | Up Next

Frank and CJ head to BPCA and LEAD, while Scott catches up with KYOCERA and Lexmark.

Activation, Backup Solutions, RMM and More

10 • Caltronics, ComDoc, and ACS/Xerox Receive Nods at PSIGEN Software's 2016 Resonance Users & Partners Conference

10 • Andy Slawetsky's Industry Analysts, Inc. Launches the New "What's Happenin' Daily," Backed by Popular Demand



THIS MONTH ON

TheCannataReport.com

EVENTS



Talking MPS with Xerox's Elizabeth Fox

Elizabeth Fox, VP of Managed Print Services for SMB, Xerox Corporation (Xerox) articulately shares her insights and thoughts on the commoditization of managed print services (MPS) today, and Xerox's reaction, which includes Xerox's vision of MPS for the future, and the impact the company's new and innovative ConnectKey technology will likely soon have on MPS engagements.

MANUFACTURERS



Lexmark Agrees to Acquisition by Apex and Pag



Konica Minolta Acquires Action Business Systems

SERVICES



LMI Solutions Names Terry Dixon President

DEALER GROUPS



BTA Posts Channel's Choice Ballot

SCANNERS



Healthcare + Scanners = Golden Opportunity

FUNDRAISING



Jenna Stramaglio Named to Jillian Fund Board



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No. 22: Running with the Software Programs

One of the pitfalls of offering advice to dealers is that we sometimes preach to the choir, or at least those with the talent to perform in the choir, but need an extra nudge to step up to the mic. Still, we have an obligation to reinforce and validate new business, product, and marketing opportunities such as software, or solutions as some in the industry refer to it.

Dealers like you who read our publication are smart people and wouldn't be where you are today if you weren't making smart decisions or learning from your mistakes. Most readers don't need us to pontificate about how critical software has become to their businesses and their customers. At the same time, admittedly, some readers still do need to hear that message.

Plenty of dealers have been adding software to the hardware sale for years, often successfully, albeit sometimes stumbling along the way. It's a rare dealer that hasn't been confused at one time or another by the many choices of software available to them.

Even though the industry has been touting software for more than a decade, there is still much to learn, especially with new players and programs emerging all the time. Software is now critical to our industry and the future of your dealership. That's why we're broadening our coverage in this area, starting with this special software-themed issue. In addition to our virtual software panel, we have a feature on capture software, as well as an interview with PSIGEN Software CEO Glenn Johnson.

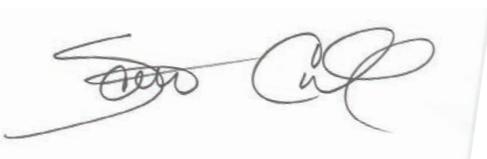
You'll also see our software coverage expand exponentially in the digital edition of The Cannata Report, as well as on the road during the various panels we are moderating, featuring key players from the software arena. As a complement to our virtual software panel in these pages, you'll find a bonus question asked of our panel this month on our website.

Even the OEMs realize that it's not all about hardware anymore—it's about adding value to the box. Attend any dealer conference and you'll see an array of software partners in the exhibit area, along with the OEM's homegrown solutions.

As we expand our software coverage, a key part of our mission going forward is connecting you with the leaders in the ever-expanding software segment, as well as your peers in the dealer community, who can share their experiences in marketing software with you. We'll also be writing more about the programs dealers are implementing in their dealerships—something that's become increasingly important for dealers offering MPS and managed services, as well as those looking to replace their existing ERP.

When it comes to software, we may not telling you anything you don't know already. Our aim is to simply reinforce why expanding your knowledge about software is important to your dealership and why it will continue to be so to this industry.

Sincerely,



Scott Cullen
Managing Editor and Chief Correspondent



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Since 1994, ACDI has established ourselves as a leader in the print management industry, constantly focused on providing best-in-class solutions and support. As one of the few PaperCut Authorized Solutions Centers; we supply and support our dealer partners with Papercut MF®, one of the fastest growing print management solutions in the world.

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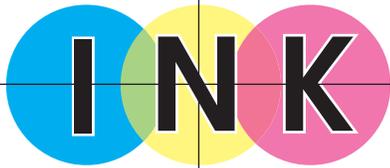
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INDUSTRY AWARDS, ACKNOWLEDGMENTS, ANNOUNCEMENTS & SIGHTINGS

BY CJ CANNATA

Drupa 2016 Estimated to Draw 300,000 Global Attendees

In a few weeks, drupa—an international conference focusing on production and high-volume print—will kick off in Düsseldorf, Germany, from May 29–June 10. Taking place every four years, the last drupa in 2012 drew an estimated 300,000 attendees (including exhibitors).

The manufacturers slated to be present at the 2016 show include: Canon, EFI, Hewlett Packard, Konica Minolta, Ricoh, and Xerox.

Similar to the old Hannover Fair and CEBIT, the show will occupy a total of 22 buildings, drupa's fairgrounds are enormous. The event will feature 19 halls of exhibitors and include several press conferences and keynote addresses.

The conference even has its

own song, “drupa is in town again” (www.soundcloud.com/drupa-1/drupa-song-2016). This year, Düsseldorf-based musician and composer Dieter Falk wrote the drupa hymn and soul singer Bonita Niessen of South Africa has brought it to life. The soul track features hot horn licks and plenty of funky

guitar and piano riffs. According to the 3rd drupa Global Trends Report 2016, an analysis and trends of the print industry published in the run-up to the conference, economic recovery from the financial crisis in 2008 is incomplete and uneven. However, printers everywhere are increasingly optimistic about their prospects throughout 2016, despite tightening margins and falling prices. This is influencing their plans for investment in production equipment.

Given the growth opportunity in the production and large-format printing market, which has been substantially stimulated by industrial printing, drupa is shaping up to be a formidable affair. The Cannata Report's newly appointed EVP and Publisher CJ Cannata and Frank Cannata will attend and report back from Düsseldorf upon their return from this relevant event.

For more information, visit: www.drupa.com.



Visual Edge Technology Acquires Imaging Solutions

Visual Edge Technology Inc., a holding company that consists of an Imaging Solutions Company portfolio, including Copeco, Inc., Commoweath Technology, Inc., Graphic Enterprises Office Solutions,

Inc., Lexnet, Inc., and WBS Technologies, has completed the acquisition of Image Source, one of the leading independent document management/office and I.T. solutions dealers in the U.S.

Image Source provides sales and service of Xerox multifunctional and production print products; Canon, KIP and Mutoh wide-format, and HP products; 3D printing technology and assorted office solution software; managed print services; and IT solutions. Visual Edge engendered the Imaging Solutions acquisition to give them increased and reliable coverage in Cal-

ifornia thru 12 direct locations and 72 sales professionals. Image Source has been serving California businesses and institutions since 1988. Former Principal and President Brad Craft and his senior management team will continue in their current capacity leading the company as it expands into new markets. Image Source is headquartered in San Bernardino, California.

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Continuum University Issues 1,000 Specialty Certifications in Help Desk Activation, Backup Solutions, RMM and More

Continuum University, the self-paced, interactive online learning center at Continuum, issued 1,000 specialty certifications in various disciplines this month. These included Administration, Remote Monitoring and Management (RMM), Help Desk Activation and Backup Solutions. Continuum expanded the certification pro-

gram to include the four specialty areas in November 2015, and all four are now required to become a Continuum Certified IT Expert. In May of last year, Continuum U announced 1,000 Continuum Certified IT Experts in the legacy program, all having completed the required courses and passing the certification exam.

In order for technicians to become certified in a specific area, they are required to (1) watch the video modules; (2) complete the guided reviews; and (3) pass the Continuum specialist exam with a minimum score of 80%. Continuum University keeps its courses up-to-date so that they reflect the latest Continuum

product and service updates and content within the bite-size videos that can easily fit into MSPs' busy schedules. The self-paced learning environment includes more than 100 modules of instructional video. MSP partners are able to track their company's progress as well as that of their individual technicians.

Caltronics, ComDoc, and ACS/Xerox Receive Nods at PSIGEN Software's 2016 Resonance Users & Partners Conference

PSIGEN Software, Inc. (PSIGEN) presented plaques in honor of their longest-running resellers/users and five awards at its 3rd annual Resonance Users & Partners Conference. ACS/Xerox received a plaque for a 15-plus year partnership. Caltronics Business Systems (Caltronics) and ComDoc, Inc. (ComDoc) received awards for Domestic Reseller Runner-Up and Top Domestic Reseller, respectively.

Aligned with the timing of PSIGEN's 20th anniversary this year, the software company hosted the 4th annual event in April at Green Valley Ranch Resort Spa & Casino in Henderson, Nevada, off of the strip.

Of the approximate 100 attendees, more than 35% were dealer representatives, including All Document Solutions, Inc. President and CEO Peter

Kimbrell; ARC Document Solutions' GM Vince Pingel; ComDoc's VP of Corporate Support Services Jim Lindsmith; Integrity Imaging Solutions President Joni Isgrig; One Source Document Solutions President Kevin Smith; ProCopy Office Solutions' Director of Software Solutions Paul Giesen; Respect Technology President Danny Duncan; and RJ Young's Director of Solutions Mark Turner.



Andy Slawetsky's Industry Analysts, Inc. Launches the New "What's Happenin' Daily," Backed by Popular Demand



Industry Analysts, Inc. (IA), under the leadership of Andy Slawetsky, recently launched "What's Happenin' Daily," a daily version of the analyst group and industry news aggregator's bi-weekly "What's Happenin' Report" Newsletter.

The daily newsletter's objective is to expand the frequency of its industry news coverage per demand from IA's "What's Happenin' Report."

"What's Happenin' Daily" will feature three to five snapshots,

teasers of key daily breaking news, which IA will expand upon as applicable in its anchor "What's Happenin' Report" bi-weekly email platform. Register at <https://paper.li/aslawetsky/1422543483/#/>.

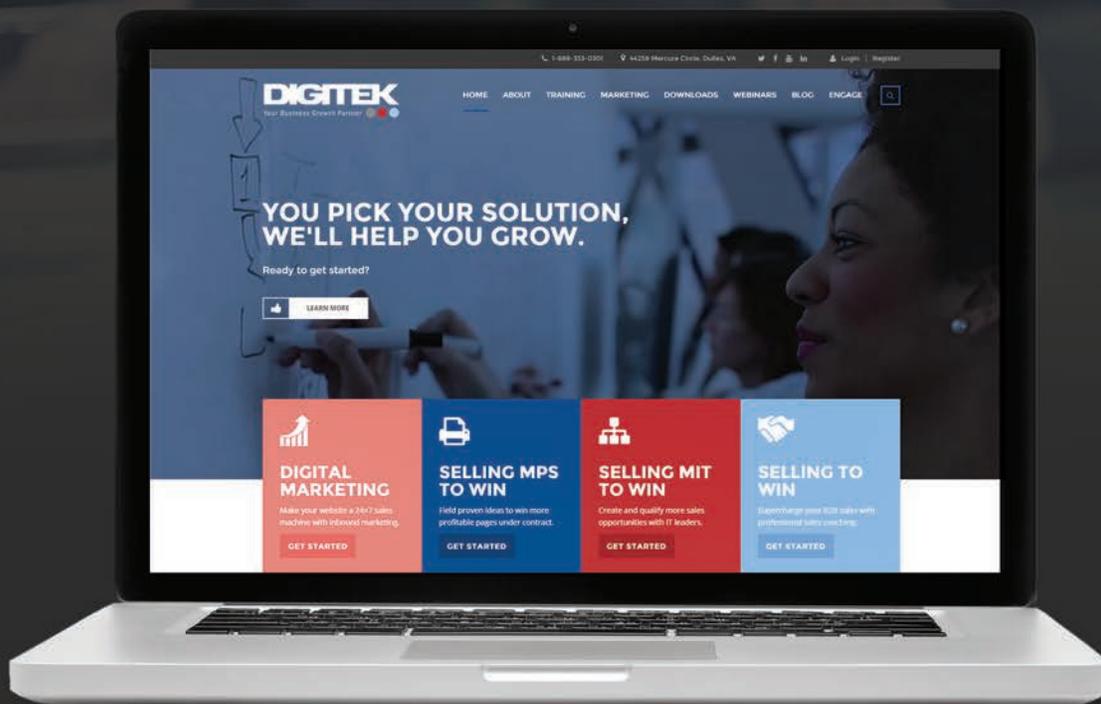
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Worldwide Electro-Graphic Downturn

Core Imaging Device Segment Declines; Experts Predict Increases by 2018

On March 25, 2016, Information Equipment Business Committee of Japan Electronics and Information Technology Industries Association (JEITA) published its annual market report and forecast for the worldwide information equipment market from 2015 through 2018.

The report reveals that the worldwide market for electro-photographic printers dropped significantly for the second consecutive year in 2015, as electro-photographic printers represented 93% of worldwide shipments compared to the previous year. In Japan, shipments fell to 86%. *(Editor's Note: JEITA statistics do not factor in copiers, although MFPs with printing capabilities are included.)*

While the United States and European economies continued their recovery in 2015, China's economic slowdown, resource price reduction, and currency depreciation negatively affected economies

The (2016 JEITA) report reveals that the worldwide market for electro-photographic printers dropped significantly for the second consecutive year...

in developing countries, hitting the printer market as well.

JEITA predicts that by 2018 the worldwide printer market will increase 109% compared to 2015, as global economies gradually recover.

Printer Trends

JEITA's report also weighed in on trends for various types of printers in the worldwide market, along with estimated shipment figures.

•**Dot Impact:** Worldwide shipments were 3.04 million units in 2015, or 95% what was shipped compared to the previous year. While the decline of dot-impact printers continues mainly due to the migration to other technologies, there are still applications that require a dot-impact printer. The reduction in China and the Asia-Pacific region remains modest, however, tallying out to approximately 96% to 98%, respectively, of what was shipped compared to the previous year.

•**Inkjet:** Worldwide shipments for 2015 were 68.14 million units (single-function and multifunction), or 96% of what was shipped compared to the previous year. Single-function printers represented 8.88 million units, or 90% of what was shipped during the previous year. MFP shipments were 59.25 million units, or 96% of what was shipped compared to the previous year. This represented a de-

cline in all geographical areas in comparison with the previous year's shipments, as a direct result of reduced home usage for photo output applications in advanced countries, due to the photo-sharing infrastructure generated by the proliferation of smartphones and tablets, as well as social-networking sites. Also impacting shipments was the economic slowdown, primarily in developing countries in 2015. Despite those trends, inkjet printers are becoming more acceptable for business applications, as devices that can print color inexpensively are increasing. This trend is occurring in advanced and developing countries, and it shows that the worldwide market for inkjet printers is shifting to business users.

•**Electro-Photography:** This segment declined in 2015, with shipments of single-function/MFP devices totaling 25.34 million units, or 90% of what was shipped compared to the previous year. Single-function printers and MFPs repre-

JEITA predicts that by 2018 the worldwide printer market will increase 109% compared to 2015, as global economies gradually recover.

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sented 17.6 million units and 17.9 million, 85% and 94%, respectively, of what was shipped compared to the previous year.

The reduction in single-function printers was especially significant, driving the percentage of MFPs in the worldwide printer market down to 50% compared to the previous year's shipments. Color MFPs, while still a small part of the to-

tal market, saw shipments grow to 104% compared to the previous year.

Monochrome devices represent 28.37 million units, or 88% of shipments compared to the previous year, while color devices totaled 6.97 million units, or 98% of shipments compared to the previous year. Although monochrome's share is high, representing 80% of the total mar-

Monochrome devices represent 28.37 million units, or 88% of shipments compared to the previous year, while color devices totaled 6.97 million units, or 98% of shipments compared to the previous year.

ket, color is gradually gaining its share in all geographic areas. The economic slowdown among developing countries also affected this market, and all geographic areas showed a decline in 2015.



Worldwide Printer Market (JEITA)				
Unit: (1,000)	2015 Results		2018 Forecast	
	Units Shipped	vs. 2014	Units Shipped	vs. 2015
Printer Total	106,520	93%	116,146	109%
Dot Impact	3,040	95%	2,881	95%
Inkjet Single Function	8,882	90%	8,402	95%
Inkjet MFP	59,254	96%	65,699	111%
EP* Single Function	17,554	85%	16,139	92%
EP* MFP	17,790	95%	23,025	129%

*EP: Electro-photography

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History Lesson:

Rick Taylor, the Latest in Select Group of American Executives to Serve as Officer of Japanese Parent Company

By Scott Cullen

In our haste to report the news that Rick Taylor, president and CEO of Konica Minolta Business Solutions U.S.A., Inc., was appointed to an officer position of a Japanese parent company, we incorrectly observed that he was the first American executive to receive such an appointment. While Taylor's is a

significant achievement and still a rarity in the office technology industry, especially given how long these Japanese companies have been doing business in the U.S., it is not a first. Blazing that trail were Mike Pietrunti, who held a similar position with KYOCERA Corp. while president and CEO of KYOCERA Mita Amer-

ica, prior to joining Global Imaging Systems in 2011, and Martin Brodigan, chairman and CEO, of Ricoh Americas Corp., who still serves as officer for Ricoh, Inc.



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SDG Panel, Scottsdale, Arizona



ITEX Panel, Ft. Lauderdale, Florida

Principal Panels

Panel Discussions at SDG's Winter Owners Meeting and ITEX 2016 Emphasize Key Software and Wide-Format Opportunities for Dealers

By Frank G. Cannata

On Monday, March 7, we hit the ground running in Fort Lauderdale, Florida, as we dove into a very busy two-day schedule at ITEX. In all, we had seven appointments, including a panel we moderated on wide format.

Panels are an effective way of telling a story and one that allows the audience to participate in a distinctly different manner. For example, asking those scheduled to attend what questions they'd like the panel to address is a good way to engage attendees. We did exactly that for the software executive panel we recently moderated for Select Dealer Group. Thanks to Dean Swenson, president of SDG, we had two pages of questions and were able to ask every one of them. The same was true for CDA, thanks to Dawn Abbuhl, who heads up that group.

With a panel format, there's an added advantage of a Q&A. If the panelists respond in an effective and responsive manner, that will further stimulate the discussion.

At ITEX, we were fortunate to have four representatives from manufacturers heavily engaged in the marketing and sale of large and wide format, including: Fabrizio Soto, vice president and general manager at OKI Data; John Stevens, HP's VP of Channels; Dino Pagliarello, production print product manager at Konica Minolta; and Patrick Morrissey, EFI's VP of sales for the Americas.

This panel addressed a wide range of questions that addressed the major concerns of dealers in this segment of the print business. Here, I've highlighted the key points of their responses:

- Wide format is a significant opportunity for dealers.
- Wide-format consumables have a high annuity stream.
- There is a quick ROI.
- Wide format enables dealers to expand their businesses with existing customers and add net new business.

- The suggested approach for wide format is to hire a specialist.
- Key markets are graphics, retail, engineering, and construction.
- Wide format offers a growth path from entry-level devices at \$3,000 to \$1 million.
- All large- and wide-format printers employ inkjet technology, which is highly efficient and carries a low service burden.
- Dealers should look to their primary MFP and printer suppliers as possible sources for wide-format product. If that is not available, the companies represented on our panel offer a good starting point.
- There is no other facet of the print world that will yield the profit found in wide and large format.

Our session was a double one, and along with the Q&A, ran for two hours. As a moderator, I generally look at the audience after I ask each question. I can tell when they are engaged. At ITEX, dealers were captivated and they flocked to the stage at the end with many more questions for our panelists.

The one keynote we attended at ITEX was delivered by Laura Blackmer, Sharp's VP of sales, who addressed the question of employing millennials. It was a very good discussion and deserved a much wider audience. We applaud Blackmer's efforts to lead the discussion regarding our industry's diversity, as well as her understanding of the different mentality of those born after 1980.

We'd also like to thank Jon Reardon of InfoTrends for asking us to moderate the wide-format panel. We believe it was an informative session due to the depth of knowledge of the panelists. They hammered home an important message: Wide format is something dealers should consider carefully.



Questions About This Story?

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PSIGEN Software's Ultimate Road Warrior

President and Official Spokesperson Glenn Johnson Powers through Ongoing Battle to Enhance Company Profile

By Scott Cullen



PSIGEN Software, Inc. President Glenn Johnson (right) with LMI Solutions, Inc.'s Director of Marketing and Business Intelligence Christian Pepper at MWAI's Executive Connection Summit in February 2016.

PSIGEN Software, Inc. (PSIGEN) CEO Glenn Johnson is psyched. Business is good, the company has hundreds of satisfied clients around the world. Its profile in the dealer community is slowly but surely on the rise. Without a doubt, there's no place for PSIGEN to go but up.

If you're not familiar with PSIGEN, you ought to be, especially since there are more than 50,000 licenses worldwide for its product, PSICapture. Its license-installed base has grown an average of nearly 30% during the last five years, with international sales now representing 15% of PSIGEN's overall revenues (license sales and maintenance).

When I caught up with Johnson on a Friday afternoon in early March, he was in Seattle. He was there to meet with one of PSIGEN's major clients, one of the largest software companies in the world. He had plans to spend the weekend there working and maybe doing a little hiking before jetting off to Dallas and Memphis, followed by a quick stop back home in Lugoff, South Carolina, before heading back out on the road again. For Johnson, travel goes with the job, but it's also part of his management philosophy.

"If you're going to lead a company, you lead out front," he said. "I do a lot of jobs in this company not because I can, but because I want people to understand that

they're following a guy who knows what he's doing, and I'm not just sitting on my [butt] telling people what to do."

He constantly places himself on the front lines of the business, meeting with dealer principals and working with the company's sales managers, product developers, and heads of professional services. There's no ivory tower for Johnson.

He's also on a mission to inject some of that old traditional copier sales mentality into the software business.

"We have grown because I believe in the old copier model, grip and grin," said Johnson. "In the software world, this is generally what happens: Someone is interested in your product and you sign them up [as a reseller]. Then, you give them technical training. Then, you give them sales training. And here's the wonderful part. The software companies sit back on their ass with their hand out waiting for an order. We don't do that. We go out and earn our business."

Meet PSICapture

PSIGEN's flagship product PSICapture is used by anyone who has digital files or papers that require data to be extracted, filed, processed, indexed, or forwarded.

"PSICapture has over 30,000 combinations of features and can handle most, if not all, business needs," said Johnson.

It can even quickly locate a single word in a 10,000-page document, a capability that users love.

Johnson described PSIGEN's target market as, "any organization that would like to increase accuracy within a manual or semi-manual process."

Contributing to PSIGEN's success are partnerships with some of the best and brightest companies in the document management and enterprise content management world. PSIGEN works with OPENTEXT and Dell (Dell now offers ECM, document management, and scan-

ner drivers), as well as BPO providers such as ACS/Xerox and value-added resellers located around the globe whose primary focus is Microsoft SharePoint and document management solutions. Plus, PSIGEN has an agnostic approach with all the MFP OEMs.

A Model for Success

PSIGEN has a fascinating business model in that it is a worldwide, virtual organization. Originally, most of its software development took place at its Irvine, California, headquarters, with the majority of employees being software developers. Now, Southern California is legendary for its bumper-to-bumper traffic and delays. To liberate PSIGEN's developers routinely jammed in traffic, which negatively impacted their productivity, PSIGEN decided to become a virtual company in 2008.

Since most of the operating costs associated with a software company are related to development and compensating developers, Johnson said he doesn't care where developers work, as long as they're getting their work done.

"If you have the right hiring model and hire the right people, they are just as productive, whether they're working at home in their PJs or in a suit in [an office]," emphasized Johnson. "If you fit our hiring profile, it doesn't matter where you live. We have low turnover, and we're growing because we can hire the best of breed all over the world."

This model has allowed PSIGEN to attract top talent.

Turning the Channel onto PSIGEN

PSIGEN has been making inroads into the document imaging/business technology channel. As we are all aware, that's not always an easy thing to do for a software company, especially when competing against established solutions already in the channel. However, Johnson will be the first to acknowledge that PSIGEN still has a long way to go.

"If you fit our hiring profile, it doesn't matter where you live," stated Johnson. "We have low turnover, and we're growing because we can hire the best of breed all over the world."

"We did not focus on 'copier' dealers until I came here," he revealed. "The reason was the software companies that want the copier business don't understand the financial models or benchmarks required to grow the business, i.e., the recurring revenue stream from the maintenance, the toner and parts, and drums and all that."

Johnson does. Prior to joining PSIGEN a little over two years ago, he worked for various office technology dealers and ran the IT department for Sharp in South Carolina.

Has Johnson learned any valuable lessons from being on the dealer and Sharp side of the business?

"You need a dedicated focus and you have to understand how to solve business problems," he said.

One of PSIGEN's biggest challenges as it looks to gain a foothold in the dealer channel is the attitude of the dealer community when it comes to selling software.

"The reality is these dealers are not in love with software," contended Johnson. "What they are in love with is more box pull-through—when they can put software on the front end that will help them win the hardware transaction, whether it's copiers, printers, digital displays, or managed network services. Then, what you're doing is creating a stream not only for us, but also for software licensing and maintenance."

As far as Johnson is concerned, the service component the dealer channel excels at is what makes the channel ideal for selling a product like PSICapture.

"People who buy software still want to be serviced," he said. "They don't want people to sit behind a firewall when they have a problem. The best industry to adopt software is the copier industry."

With that thought in mind, Johnson is out to educate dealers that supporting software works harmoniously with the financial model of the copier industry and can provide them with a competitive advantage in the market.

Johnson says that sales reps are already calling on the types of businesses that can benefit from PSICapture. The challenge PSIGEN has is getting them to focus on identifying a business problem and demonstrating that the MFP box is the on-ramp for inputting paper-based data into electronic form, which feeds into line-of-business applications.

Capture and Big Data

Johnson also likes to talk about how PSIGEN's products help dealers compete in the digital world. Yes, some of that's marketing hype, but much of it is driven by necessity as a result of the changing marketplace and opportunities to add greater value to customers.

"Capture is playing a larger role in big data," said Johnson. "The number of U.S. firms using big data in the last three years has jumped 58% to 63% penetration, while 70% of companies now say that big data is critical in importance, an astounding jump from 21% in 2012. The modern MFP has created a 'scan, email, and store' approach that falls short of creating profitable opportunities for local MFP dealerships and has left a void when trying to compete in big data business opportuni-

PSIGEN is a debt-free company that owns its own source code, something that Johnson considers an asset. Why is that important? “Because we are not reselling a product that we can’t control,” responded Johnson.

ties against local ISV [independent software vendors].”

Johnson said that by utilizing PSICapture on the front end of an MFP transaction, a sales rep can exploit big data opportunities by using the MFP as an “on-ramp” for paper-based documents.

“These documents become more tightly integrated into key business processes and activities when converted into digital form,” he said. “By extracting the metadata and migrating the digital data, it creates additional hardware placements, using panel integration, greater licenses of document management and workflow software, and opportunities for MNS. Therefore, revenue, gross profit, and monthly recurring maintenance opportunities increase exponentially.”

Johnson hones in on the dollars and sense (not cents) aspect of PSICapture as he continues his mission to convince more dealers to take a chance on the product.

“Many solutions on the market offer similar deliverables and have a large price tag to match,” said Johnson. “The licensing approach that PSICapture offers allows for a sensible investment for enterprises of all sizes, from the smallest law firm to the largest manufacturer.”

Understanding that a significant portion of *The Cannata Report*’s readers are selling an MFP, we wondered how much of an impact hardware has in the decision to implement PSICapture.

“Utilizing a common multifunctional device as a digital capture workstation is

the best approach for all companies of all sizes and types,” replied Johnson. “These ‘on-ramps’ collect and capture data from paper and can inject information [metadata] that is critical to any process into current line-of-business applications. For MFPs with panel integration, users can push a button on the front of the MFP. This allows employees to utilize an existing and familiar digital platform to process paper-based documents.”

Source Code Ownership Benefits

PSIGEN is a debt-free company that owns its own source code, something that Johnson considers an asset.

Why is that important?

“Because with PSIGEN we are not reselling a product that we can’t control,” responded Johnson.

“If you did not develop it, you are held hostage by the changes,” he said. “Maybe you’re an influencer. But, you can’t get to the developmental team, so you can’t drive the direction you want the software to grow. Software is a fast-moving industry. It’s like playing chess—you need to think three or four moves down the road.”

He recalls a dealer who had a prospect who wanted to black out a portion of social security numbers in documents and files, something that PSIGEN’s software did not provide at the time.

Understanding that this was a make-or-break feature, PSIGEN’s development team went to work and in less than a week, the software was able to provide

that capability and the dealer closed on that account.

“That’s a prime example why by owning our own source code, we’re either our own worst enemy or our own greatest champion,” said Johnson.

Resellers who partner and do business with PSIGEN shouldn’t fear that a virtual company is unable to provide the support they’re accustomed to or demand from their other vendors.

“Resellers and integrators need to know that the support of these solutions will not overwhelm their staff,” said Johnson. “PSICapture has a proven track record of handing projects of any size, and the support team at PSIGEN always delivers an above-and-beyond response.”

Last Lines

While PSIGEN is still finding its way, Johnson’s personality is no doubt leading the way.

“My wife says I have a strong personality, which is probably a nice way of putting it,” laughed Johnson. “If you can make a difference and you can make a dollar, you will win. That’s my slogan.”

Overall, he’s pleased with the inroads the company has made in the dealer channel, but he’s also realistic.

“We are growing and doing a good job, but I’m not trying to bowl in the ocean. I’m just doing it one at a time with good resellers. I’m taking our model and combining that with what they’re doing.”

Whether PSIGEN bowls a strike or a spare in the dealer channel, expect it to remain competitive while providing the channel with another viable scan-and-capture option.

OR

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Managed Print Services and the Internet of Things

The Relationship is Leaving Its Mark on the Document Imaging Industry

By Lee Davis

Originally published on buyerslab.com



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Downtime, in just about every scenario, is a disaster for all businesses. Unplanned downtime—something Harel Kodesh, vice president and chief technology officer at GE, refers to as the “bane of ... industry”—is particularly problematic simply because it hampers profits.

“Unplanned downtime is when you sit on an airplane and the captain comes in and says, ‘Well, this plane is not going to fly today,’” Kodesh said during his keynote at Cloud Foundry Summit last year. “If [the plane breaking down] were planned, then you wouldn’t be sitting in the plane. It should be sitting in a hanger getting worked on. At the end of the day, this is what we’re trying to optimize. We’re trying to optimize the operation of assets. We’re trying to give our operators some insights about what it is they need to do.” Coincidentally, Kodesh’s airplane anecdote

shares a lot in common with managed print services (MPS). In the same way cancelled flights hurt the airline industry’s bottom line (while simultaneously inconveniencing and angering customers), inactive MFPs negatively impact MPS providers. Also similar is how, given the appropriate data, unplanned downtime is avoidable. The gauges and sensors on an airplane can detect a problem before one exists, and with the help of monitoring software, so can document imaging devices. Further, the data can be used—to borrow Kodesh’s words—to “optimize the operation of assets” for one’s customers. In the Internet of Things (IoT) era, unplanned downtime doesn’t have to be a disaster. In fact, it doesn’t have to exist.

Looking around your office, it would be hard to find an electronic device that doesn’t have software or sensors and network connectivity. The ubiquity of these embedded technologies range from the obvious like your computer or mobile devices, to the less obvious such as the coffee maker or refrigerator. This enables communication between devices, as well as the monitoring and harvesting of data, so we can learn how much power the devices consume, usage rates, and much more. While this may not be important data when talking about coffee makers (unless you’re the folks at Folgers, I suppose), it can tell us a lot about the way we work, and more importantly, how we can make improvements.

The spread of IoT to MFPs perches MPS providers at a vantage point like no other before. The concept of IoT opens the door for MPS providers to learn everything about the devices they supply and how

users interact with them. The end result is optimized productivity and efficiency that would bring Henry Ford to tears.

The Basics

The IoT came about when thirsty researchers in Carnegie Mellon University (CMU) got tired of walking down a flight of stairs from their offices to the Coca Cola vending machine, only to find that it was empty, or the sodas inside weren’t cold. As a result, they connected a sensor to the vending machine that communicated with a server. Researchers could access the server and check if the machine was stocked with cold soda before making the trip.

Similarly, the core functions of any MPS solution are usage tracking and device monitoring, and reporting that information to a remote location so a field technician does not have to be present at the printer or MFP to gather it. MPS is a more sophisticated iteration of the CMU researcher’s project. Except, instead of asking how much Coca Cola an office has, it asks what type of devices it has, as well as the basic information pertaining to that device such as its serial number, location, MIB data, IP address, and status, just to name a few.

But the exchange of information doesn’t end there. MPS providers can poll machines to see what they’ve been up to. For example, solutions from Print Audit, PrintFleet, AB Asset Management, BITS, and others collect dozens of different meter counts, including number prints, copies, scans, faxes (which can be further broken down by color/monochrome), paper size, and manufacturer-specific data.

In the end, MPS providers will be in possession of terabytes upon terabytes of information regarding all of their customers' document imaging practices. This data reveals plenty about an organization and should be leveraged to increase sales.

This data is extremely valuable as it can be used to determine better output policies and future budgeting that can save companies thousands (or for large enterprises, hundreds of thousands) of dollars.

The Minority Report on Office Systems

Perhaps the most common reason a device becomes unavailable is because it has run out of toner or another consumable. This isn't a big deal, right? Surely, your customers can walk to the supply closet to retrieve and load the required consumable. But what if, when they get to the closet, they discover that the stock of cyan toner required for the 100-print run of PowerPoint brochures they'll need for that afternoon's presentation has been depleted? This situation would have panned out differently had the MPS provider been using a system that can track the consumables on-hand at a customer's location, predicting when those consumables will be depleted based on past usage patterns, and automatically shipping them to the customer site (even from a third-party supplier).

Running out of toner isn't the only situation that makes business processes difficult for your customers. There's always the classic device failure. When a device goes down during of your customer's busiest season, you won't hear the end of it. Then again, you wouldn't encounter this problem as often had you employed MPS tools capable of intelligent dispatching. Canon imageWARE Remote, for example, can prevent failure thanks to its "Proactive Device Maintenance" feature. According to Canon, Proactive Device

Maintenance "allows [the] device to 'call out for help' whenever service is required to keep it up and running." As a result, customers will know when and for how long a device will be offline for preventative care, allowing them to make adjustments for that time as to not impede on productivity. Further, this route is far more cost-effective, as it reduces the amount of money spent on labor and replacement parts. Dealers will benefit from the maximized uptime afforded by preventative maintenance in the form of more clicks. An offline device isn't going to make MPS-providers any richer, so the ability for a device to beacon for help before it fails can be viewed as a loss-prevention mechanism.

Since our universe is ruled by entropy, we can't prevent every failure with preventative maintenance. But thanks to the IoT, we can view a machine's health from a macro- and micro-level. Kodesh explained the importance of perspective.

"When you think about it, a locomotive is a big thing running on railways, but at the same time, it's 150,000 parts, traveling together," Kodesh said. "Sometimes, you have to look at the locomotive as the big hunk of iron, and sometimes, you have to look at a part and have to figure out where the right depot is, where the spare parts are, and where the other locomotives that this part is installed in are."

When a device fails, it's good to look at different components individually. After all, it's not like the entire machine is broken. It can be something as simple as an unreachable paper jam to something catastrophic like a gear that needs to be

replaced. Many solutions monitor devices for failures in real time and enable dealers to set which error conditions trigger an alert to their personnel or to customer IT/help desk personnel. In many cases, the dealer may know about a device failure before the customer. Further, some tools offer integration with existing dealer billing and service-dispatch tools to help streamline dispatching and billing, as well as helping to keep track of which tech is doing what, and where.

Equipped with error codes that help zoom in on the device's problem, dealers can dispatch their technicians with all of the relevant information and proper equipment. This will eliminate situations where techs have to drive between their shop and the jobsite because they didn't know which equipment they needed until they arrived at the site. With imageWARE Remote, technicians can use imageRUNNER ADVANCE devices' built-in browser to access the NAVI encyclopedia to expedite the repair process. This feature is common among competing solutions, but usually comes with the caveat of being device- or model-specific.

In the end, MPS providers will be in possession of terabytes upon terabytes of valuable information regarding all of their customers' document management imaging practices. This data reveals plenty about an organization and should be leveraged to increase sales.

CR

Lee Davis has been a research editor with the Buyers Lab, Inc. (BLI) solutions team since April 2015. In addition to maintaining BLI's coverage of the solutions segment, Davis also contributes editorial content centered on news and trends in the document imaging industry.

BLI has been covering the document imaging industry for over 50 years. Read more at www.buyerslab.com.

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Segment 3: Software

VIRTUAL PANEL SERIES

As the Importance of
Software Increases,
Dealers Struggle with
Adopting Apt Partners

By Scott Cullen

As software becomes increasingly important to the dealer community, a serious challenge for them is to identify the most appropriate software partners possible. With so many players to choose from, there's no foolproof strategy for picking the best partner or partners. Learning about the various programs and software providers is a good start, as are references from other dealers and the OEMs.

To help educate our readers about this critical product category, we've assembled a panel of five diverse software vendors to share the basics of their software, the keys to successfully selling it, the margins and ROI associated with their programs, reasons to choose them as a partner, and what to expect from them during the next six to 12 months. Panelists include Chris Dance, President of PaperCut; Print Release's Jordan Darragh, founder and CEO; Bruce Malyon, President of MaxxVault; Vaclav Muchna, CEO and co-founder of Y Soft; and Stephen Young, President and CEO of Square 9.

[Editor's note: See our digital edition for additional comments from our panelists about the trends affecting their software development, as well as a bonus question and answer.]



Bruce Malyon



Vaclav Muchna



Chris Dance



Jordan Darragh



Stephen Young



Software/solutions can be complicated for some dealers to understand. What's your elevator pitch to a dealer who asks what your software does?

Dance: A lot of people in the industry know what print management is, but we like to take it back to the basics of who's printing what, where, when, and how in an organization. Effectively, PaperCut is about the many aspects of print management. The two big aspects that stand out are document security and waste. Particularly in the last couple of years, there's been a real focus on security.

Darragh: PrintReleaf does something for the dealer and something for the customer. The way that it works is that it integrates with the dealer's MPS monitoring software—typically, FMAudit, PrintFleet, or some similar flavor. It mines out paper consumption data. It equates it to forest impact, measured in trees. And then, it makes that data actionable so customers decide where to reforest their consumption back into the natural environment through a network of reforestation projects we've certified around the world.

The customer achieves, at minimum, a neutral environmental impact as a result of printing, if not a net positive impact, depending on the potential certification of their paper. A simple way to say it is: It's an automatic subscription to reforestation for a more sustainable print solution.

Malyon: Simply put, MaxxVault solutions will help customers/companies manage, create, process, access, and secure important documents and other digital content.

Muchna: YSoft SafeQ is an enterprise print management and document capture [software] solution. It offers three main benefits: reduced costs associated with print services and infrastructure, increased document security, and improved productivity by automating document workflow. Our software is a great addition for a dealer who understands the added value software solutions adds to the sale of [MFPs].

YSoft SafeQ (offers) reduced costs...associated with print services and infrastructure, increased document security, and improved productivity by automating document workflow,"said Muchna.

Young: [Square 9] is a leading developer of solutions for business process automation. That includes document capture, content management, process management, and web forms. We like to tell people we help organizations work more efficiently by putting their information into motion. But what does that mean? I typically follow that up with a question: If your customer can scan a vendor invoice from your MFP and have it create a payable invoice in QuickBooks with little or no data entry, would that be something they'd be interested in? That usually starts that conversation.



Everybody is interested in margins and ROI. What kind of margins and ROI can a dealer/reseller who takes on your product expect?

Dance: ROI is not just about margin on software, but it's about the total service and package. And with the advent of strengthening professional services offered by the dealer network and by our Authorized Solutions Center network supporting the dealer network, they're able to offer increased services, which results in a better ROI. If you're providing a service, the margin on that and around other services you're offering is substantially higher. That's a trend that's occurring across the software industry as a whole. It's not only about margin on the software or component. It's about the services that go around it.

Then, I would say there are other forms of

ROI around our product and often other forms of customer value such as customer loyalty and retention that is generated through our product. It's been an attractive proposition to dealers as well.

Darragh: For the most part, dealers take our costs and build it into their cost basis. In the makeup of the financial structure of the page or the click rate, you've got different ingredients—toner, service in terms of parts and labor, etc. They're going to have their monitoring fees for whatever their solution is, and then, they typically bundle in PrintReleaf. We license our software on a cost-per-page basis so it's very digestible.

Our rates vary depending on the page volume that a dealer transacts on our service every month. Just like with monitoring software, for example, if the dealer has 1,000 machines mapped versus 10,000, they're going to get a cost break, and it's a similar structure with us. Then, the dealer adds their margin. If their standard margin is 40%, they're effectively making 40% on PrintReleaf. How our rates impact the retail rate is rather immaterial because our costs are so low on a per-page basis. The cost to the dealer starts at \$0.00025 per page, and that's the highest price we have. As volume grows, typically, it can get down to \$0.00015. At the same time, we also sell through distribution, and those distributors are very creative and aggressive in how they bundle and package our service as well.

Malyon: This depends on their level of partnership and their commitment to providing solutions. Many dealers like our Gold Partner program because it allows them great margins on our entry package MaxxDocs. The product is simple to install and support, so that adds to their ability to generate revenue. A partner selling MaxxDocs can expect to earn 150% to 200% margin based on what they are paying for the solution if they are doing the support and installation services. A dealer that has already sold other solutions might jump right into our Platinum Partner program. The margins on software range from 35% up to 55% based on sales volume. Service revenue and

training tends to be much higher for our MaxxVault Enterprise solutions so dealers that are installing and supporting the software can make awesome margins and return on their technical commitment to MaxxVault.

Muchna: It depends on how much the partner is involved in the entire sales process. The margin proposition is actually built on three pillars:

- Margin on software, where it is generally higher than on hardware. Also, as Y Soft does not sell direct, we avoid a conflict between channel and direct sales.
- Margin on service, where this can add up to something like 50% or more. It depends if the partner has the infrastructure and ability to provide the support on their own, only being backed up by Y Soft support when needed. In our margin model, the higher the service capability the partner has, the higher margin they enjoy on the software.
- Ability to leverage the solution to sell other equipment. This again requires a good knowledge about the solution, which needs a strong IT background.

Young: We make it easy for the reseller to come onboard. The ROI is quick, usually with their first sale. It's not a major investment. We look at the real value of the deal being in the sales that follow. For example, our reseller fee is nothing more than to have skin in the game.

The margins a dealer makes depend on two factors—their sales performance and the level of services they provide. A lot of people take on solutions and struggle to a certain extent. We always wondered why because office equipment dealerships are some of the best sales organizations in the world. What we're seeing is the dealer doesn't want the added burden of managing a professional services team and worrying about things such as utilization rates and downtime. They want to go out and sell. They'll work with us to sell a deal and then have Square 9 do the installation and configuration. In the meantime, the dealer is closing the next sale while we worry

"We made it easy for the reseller to come onboard (with Square 9). The ROI is quick, usually with their first sale. It's also not a substantial investment," said Young.

about the delivery and the things that may be associated with it. In this scenario, a dealer typically sees an across-the-board margin of about 40%. They're getting a piece of not just the software, but also the professional services and support.

The more traditional model that many dealers have followed in the past is one where they [provide] their own professional services and Tier 1 support. That pays out at a higher rate, closer to 65%, when you factor in services and support. The bottom line is that not all the dealers have the same resources, so we're happy to work with them in any capacity they're comfortable with.

 *What are the dealers who are successful selling your software doing to make them successful?*

Dance: There is a big difference between a successful dealer and a non-successful dealer, and a lot of that is because the ones that are successful have embraced our product from the top down. It's not just a line item on their book. It's entrenched in their services. When you ask many dealers what software they sold first, it was PaperCut because PaperCut is one of those products that works across all verticals, all industries, and is easy to set up and deploy. It also offers that power of flexibility. The dealers that embrace it and offer the services around it, and train their staff to be subject-matter experts not just in our software, but also in solutions and print management in general, have seen an increase. Also, it's often about putting in place a formula to reward or incentivize some of the sales practices around a solutions offering. It's not just about tak-

ing the box. It's all about the end-to-end service and incentivizing that.

Darragh: The dealers that are successful make PrintReleaf a part of their DNA. It's in every single proposal, every single renewal. It's a requirement of the sales force. It's built and integrated into their pricing catalog. It's a no-brainer. It effectively forces adoption by the sales force and forces adoption by the customer, becoming part of their culture as to who they are as a dealer and how they go to market. At the other end of the spectrum, we have some dealers who sign up and are more optional about it. They'll put it strategically in this renewal or that proposal, and only their savviest sales reps might get it adopted.

Malyon: Our core set of dealers that are doing well selling our solutions all have at least one in-house software solutions specialist. I'm not saying this solutions person is just for MaxxVault, but it's a person that understands the three to five main software packages that the company represents. If it's a mega dealer—a dealer with five or more locations—there might be a team of solutions specialists. The specialist helps the company's sales team qualify the deals and then works with one of our team members to setup a demo or build a proposal.

[Successful dealers] have made an important decision that solutions are a strategic direction, ensuring they are leveraged significantly in sales/consultant bonus schemes. They understand that solutions-selling takes more time, requires higher skills, and is closer to an IT integration than the traditional box-moving. The rewards are higher margins and better competitiveness.

Muchna: Typically, sales people know the solution on the surface. When they see/create an opportunity, they bring in a solution consultant/expert/architect (typically more technical than in a sales role, with strong IT knowledge). In smaller organizations, the same person may also deliver [install] and support the solution. With larger partners, that might be a dedicated person or team.

Young: A top-down focus from the leadership of that dealership. It's one thing to say solutions are a key initiative for your dealership, but if you don't build a business model around it, you're not preparing to be successful. What that means is your comp plans need to be structured in a way to reward reps for integrating solutions into their equipment sales, and that pays your managers for achieving performance goals. Dealer principals who achieve success are usually setting goals for their teams, measuring the results and rewarding success. It's no different than any other type of sale, but they have to have that business plan in place, much like they would for their equipment sales.

We also stress that the dealership also has to build an aftermarket. I was at a presentation with Frank [Cannata] in Phoenix a couple of weeks ago, and one of the complaints the dealers had was that there is no aftermarket like there is on the equipment side. A lot of those dealers haven't built that model. What they need to look at are ways to expand the use of these solutions post-sale with additional services, additional licensing, and maintenance agreements. They need to be able to sell between lease cycles.

Typically, a rep will go out and not come back for 55 months before that 60-month lease is about to expire. Then, they'll approach [that customer] again. There's an enormous opportunity. We always talk about document management as the gift that keeps on giving—the fact that you can sell additional licenses, or expand into other departments. Dealers need to take a look at that type of aftermarket and make it a viable solution for themselves.

CR | *Why should a dealer partner with you?*

Dance: It depends on what stage a dealer is in their life cycle around solutions. The reason to partner with us would be because we have a fantastic offline price solution set to network. We're a software company and we recognized in the early days that software and technology is what we do best. Understanding the service and support dealers need, we re-

“MaxxVault offers great products and provides both partners and customers excellent support. It's a win-win (and profitable) for both parties. One of the other big reasons is that we don't oversaturate a region,” said Malyon.

alize there are organizations that know how to do that better, so we established 20 Authorized Solutions Centers globally. Those Solutions Centers understand the dealer market and the copier industry. Combined with our technology and network of Authorized Solutions Centers, we can offer the support the dealer needs, whether it is anything from learning to sell all the way to advancing professional services.

Darragh: We represent next generation MPS. There's a lot of talk around services. We are an affordable, attractive service that customers like. If you want to bring something new to the table, especially at this point in the development of our company, it's unique and innovative and helps separate you as a dealer. You not only have a competitive advantage, but you're also providing value to your customer in a simple and automated way where they don't have to lift a finger to have an automatic subscription to reforestation and a more sustainable print solution. We're finding that message resonates positively with today's customer, and that interest is only growing.

Malyon: MaxxVault offers great products and provides both partners and customers excellent support. It's a win-win [and profitable] for both parties. One of the other big reasons is we don't oversaturate a region. In most areas, we have only one key Platinum partner and a small number of Gold partners. We want it to be a true partnership so we don't need our

partner's biggest competitor carrying our product as well.

Muchna: First, it is the technology. With the YSoft SafeQ platform, one can cover more solutions (print management, workflows, mobile phones, mobile print, 3D print—to name a few). That means you can do more with less, especially if you are limited on resources. (However, you need to have the solution consultant role!) The platform also offers a price benefit with the more solutions in the platform you use.

In general, we don't try to be the cheapest [product] on the market. Experienced partners always tell us: We don't like cheap stuff, because there is no place for our margin and it does not drive our revenue. If I sell something, it should have an impact. However, we understand we need to be competitive.

Other reasons include our direct local presence (we are not represented via VARs or VADs). We pay a lot of attention to service and support as well as to training.

Additionally, Y Soft is invested in the success of our partners. We offer training and multiple options for customer support, indirect or direct. Our Partner Reward Program offers incentives in the form of marketing support and discounts. Last year, we introduced the Y Soft Awards Program that which recognized the efforts of our partners in several categories. And we'll do it again for 2016.

Young: We pride ourselves in being easy to do business with. My background is as a dealer. I owned a software integration company prior to being a manufacturer. I understand both sides of the equation, and I've seen the challenges of when you don't have the right levels of support available to you—presale, marketing, post-sales. It gives us a perspective that's unique in this market, and our dealers recognize that and they benefit from that as well.

CR | *What can our readers expect from your company and products in the next six to 12 months?*

Dance: Security is a big factor today

and will be an increasing driver for us. You'll see enhancements around much of our functionality like secure print release and document watermarking, as well as digital signatures. Also, PaperCut is our leading product. Every day, there's development going on and every few weeks, there's new functionality coming out. A lot of that is to support new platforms that are coming out and transitions in the industry with new OEM firmware updates and the shift across to touchscreen technologies. We're aggressively pursuing that. On the horizon, there's no doubt there's cloud, mobile, and different ways of using the data that PaperCut generates. Those are important aspects on our product roadmap.

Darragh: Our product at the heart is software. Then, there's this offline downstream component with reforestation. If you look at us as a whole, the product is the whole system and one of the consistent questions from customers is: can we plant trees closer to home? We have customers in Europe, the U.S., South America, and Australia, and we don't currently have projects in all of those continents or countries, so we are looking to add projects by the end of this year in the U.S., Europe, and India.

PrintReleaf has two new software integrations currently in private beta that we expect to release publicly [in April], and we have two more integrations in the development pipeline for Q2 of this year. These integrations really unlock the marketplace, and we depend on the data in print environments to lead into reforestation, so we are very excited about these integrations. On top of that, we have significant improvements and features on our 2016 roadmap for sharing and promoting reforestation efforts publicly on PrintReleaf dashboards.

"...every few weeks there's new functionality coming out...On the horizon, there's no doubt that cloud, mobile, and different ways of using the data that PaperCut generates. Those are important aspects to our product roadmap," said Dance.

Malyon: This month [April 2016], we came out with our newest release 6.5.5 for MaxxVault Enterprise, which launched our new forms designer, MaxxForms. We also released enhancements to our secure messaging platform, MaxxEngage, along with a new product licensing model. Our roadmap for the next six to 12 months is focusing on more direct integrations with other leading third-party products. We have integrated with more than 75 products, and we expect that number to continue to grow. Our next big thing is something we are calling MaxxSafe. It's a unique concept around secure file sharing.

Muchna: With our recent announcements of the YSoft SafeQ Platform and YSoft be3D eDee for education, we will continue to roll out updates on those products. We are also rapidly shipping our large 3D printer, DeeRed, to manufacturing companies. We'll see continued integration of print management across 2D and 3D printers. With the formation of YSoft Labs earlier this year, we'll also start to see some enterprise solutions related to business process management

and the Internet of Things. It's an exciting time, and we are focused on providing the channel with new enterprise solutions to offer their customers and interesting business models for dealers.

Young: The year 2016 is going to be a big one for us both on the product and development side. The big initiative for this spring is the release of a new product called Global Capture. This is going to expand the capabilities of our dealers by providing advanced capture and data extraction solutions. Up until now, we've relied on third-party products for our capture. One important detail of Global Capture, while it's tightly integrated with our ECM product line, it's being offered as a standalone product. This is a separate business unit for Square 9. This means that dealers who are looking for a capture solution [to function as] the front end for SharePoint or another ECM product could use Global Capture to feed those products images and information. It doesn't tie only to our products.

On the company side, we're continuing our march to Latin America and Western Europe. As we bring on new partnerships and expand existing relationships, one thing that's noteworthy is we're now actively working with Konica Minolta to launch our products into Mexico in Q2. We have an aggressive business plan this year. Last year was kind of a regrouping year for us. We grew 30%, but for us, that was a down year. We typically grow much faster than that. This year, we're targeting growth of more than 60%, and we're well on our way already.

CR

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Quinten Gribble
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Brian Hamner
Senior Manager, Global
Channel Solutions, Lex-
mark International, Inc.



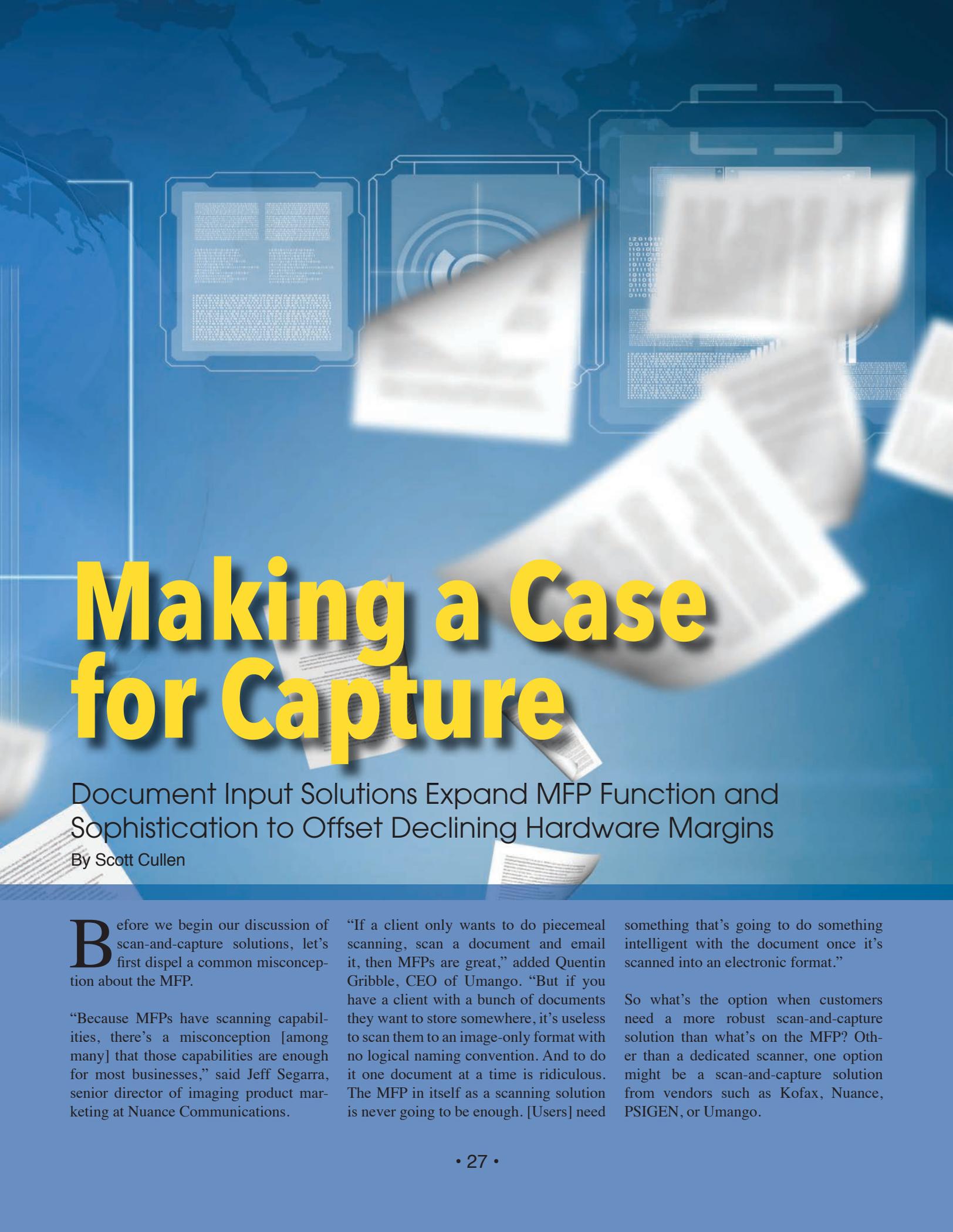
Roderick Hughes
Director of Product Man-
agement, Imaging, Nuance
Communications, Inc.



Glenn Johnson
President, PSIGEN
Software, Inc.



Jeff Segarra
Senior Director, Imaging
Product Marketing, Nuance
Communications, Inc.



Making a Case for Capture

Document Input Solutions Expand MFP Function and Sophistication to Offset Declining Hardware Margins

By Scott Cullen

Before we begin our discussion of scan-and-capture solutions, let's first dispel a common misconception about the MFP.

"Because MFPs have scanning capabilities, there's a misconception [among many] that those capabilities are enough for most businesses," said Jeff Segarra, senior director of imaging product marketing at Nuance Communications.

"If a client only wants to do piecemeal scanning, scan a document and email it, then MFPs are great," added Quentin Gribble, CEO of Umango. "But if you have a client with a bunch of documents they want to store somewhere, it's useless to scan them to an image-only format with no logical naming convention. And to do it one document at a time is ridiculous. The MFP in itself as a scanning solution is never going to be enough. [Users] need

something that's going to do something intelligent with the document once it's scanned into an electronic format."

So what's the option when customers need a more robust scan-and-capture solution than what's on the MFP? Other than a dedicated scanner, one option might be a scan-and-capture solution from vendors such as Kofax, Nuance, PSIGEN, or Umango.

So what's the option when customers need a more robust scan-and-capture solution than what's on the MFP? Other than a dedicated scanner, one option might be a scan-and-capture solution from vendors such as Kofax, Nuance, PSIGEN, or Umango.

Besides adding more value to the MFP offering, the scan-and-capture solutions available from these vendors can circumvent the margin erosion on the hardware side of the business.

"The margins in the MFP market are getting narrower and narrower, and dealers are looking desperately for software solutions where they can make more margin," stated Umango's Gribble.

Now that we've established the viability of a scan-and-capture software solutions, let's recap the offerings from these vendors, the characteristics of a quality capture solution, and the latest trends in scan and capture.

Players and Products

It's virtually impossible to discuss the topics of scan and capture software solutions without referencing Nuance, one of the elder statesmen on the scan-and-capture scene. Today, Nuance's portfolio comprises ShareScan, AutoStore, and Business Connect, its mobile capture software platform.

"Capture overall is a big part of our portfolio," said Roderick Hughes, director of product management, imaging, for Nuance Communications, as he swung into full marketing mode. "We have the most comprehensive set of solutions on the market, but we also have integration into the most devices out there."

PSIGEN, a virtual software manufacturer, offers PSICapture, a product designed for anyone who has digital files or paper that requires data to be extracted, filed, processed, indexed, or forwarded.

"[PSICapture is for] any organization that would like to increase accuracy within a manual or semimanual process," stated Glenn Johnson, PSIGEN's president.

At press time, Kofax (acquired last year by Lexmark) was still part of Lexmark's Imaging Services Solutions (ISS) group, although that could change any day

now considering all the rumors swirling around Lexmark. Kofax capture products include Kofax Express, an entry-level capture solution; Kofax Capture, its more advanced capture product; Front Office Server, an add-on solution that provides direct integration to MFPs and network scanners; and the Kofax Transformation Module, which provides advanced capture and automates data extraction and document classification.

"Both Front Office Server and Kofax Capture are applicable [to any size user], but we can position those products based on the sales [opportunity]," noted Brian Hamner, senior manager of Global Channel Solutions at Lexmark.

Also worth noting are Virtual ReScan (VRS) and TotalAgility. VRS is an image perfection solution embedded in various Kofax Capture add-ons and products that are also available as a standalone solution. Meanwhile, TotalAgility is a unified smart process application development and deployment platform that provides multichannel capture, business process, dynamic case management, and mobile and analytics capabilities.

Umango Extract, a scanning solution originally created for dedicated scanners,

was introduced in Australia in 2007. A few years later, Umango began offering an embedded solution for Konica Minolta MFPs and has since aligned itself with Sharp, indicating upward mobility among the OEMs. Extract remains Umango's flagship product and continues to gain traction within the channel, but rather than targeting dedicated scanners these days, Umango is focused on adding value to the MFP.

Capturing a Quality Solution

Ease of use tops the list of characteristics that make up a quality capture solution. At least that's the consensus among the vendors interviewed for this article.

"If you have a solution that makes it easy and fast for users to do it and get back to their day job, that's got to be your starting point," said Nuance's Hughes. "Capture always ends with retrieval, so enabling users to find their documents in a quick and easy way is core to any solution. The next step for me is ease of indexing."

Connectivity is also key.

"Capture solutions need to be able to connect to anything," said Umango's Gribble. "The greater the connectivity, the broader the offering. If you only work with, let's say, Konica devices and can only push out to SharePoint, you've narrowly limited your market, whereas if you can connect to any piece of hardware and can push it out to SharePoint, Square 9, and any other flavor [of document management/ECM program], you've broadened yourself."

"A quality capture solution needs to be flexible, feature rich, and reliable without busting the budget," added PSIGEN's Johnson. "The solution should have the ability to address the needs of the largest and smallest companies, as well as the business requirements in all departments. Finally, the software should be able to publish to many enterprise-content-management (ECM) solutions and line-of-business applications

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Aric Manion

*Owner & President, Kelley Imaging Systems
 Kent, WA*



such as Microsoft Dynamics, QuickBooks or e-automate.”

Kofax Senior Marketing Manager Joel Mazza suggests it’s all about providing a centrally managed solution that handles everything consistently and interfaces with virtually any backend—an ECM or ERP solution, for example.

“The typical way we position [our products] is where you have a business need in which you’re trying to control [the flow of] information, not just move documents from Point A to Point B or adding files to file folders and having them sit there and not do anything,” explained Mazza.

“Actually taking control of the information, making sure it’s handled the same way every time in terms of the process, no matter where the document originates or how it’s brought in (file folder, e-mail, MFP, mobile phone)—that’s where capture shines.”

Trend Setting

When asked about the trends sweeping the capture market, vendors cite the aforementioned ease of use, greater automation, and enhanced security features.

“Whether it’s a print or capture solution—across the board—security is where we begin and build from the ground up,” said Nuance’s Hughes.

“Relative to security, there’s a granularity to it, being able to track and audit where the scanned documents are going,” added Nuance’s Segarra.

It seems as though the entire document management/workflow/imaging technology industry is heavily embracing mobility and the cloud, and the scan-and-capture vendors are right there with everyone else to one degree or another, as more companies are—adding or thinking about adding—a mobile interface to their capture solution.

“Once you’re feeding documents and in-

PSIGEN’s Johnson also sees the adoption of more advanced capture techniques such as advanced data extraction, classification or “learning-type engines,” mobile capture, and integration or migration into multiple databases.

formation into an ERP system, you want to extend that to different places because you’re not just [working with] documents on paper anymore,” stated Segarra. “You may be getting them as pictures taken on a mobile device or static documents like PDFs. How you feed those documents from multiple places into the workflow is critically important.”

“There is obviously a certain attraction for the ability to take a photo, scan, or document and make use of that sort of capture solution,” stated Umango’s Gribble. “Certainly a lot of our competitors are releasing mobile solutions. We aren’t getting a huge amount of inquiries about it, but it’s [innovation is] a natural progression more than anything.”

While Gribble views the cloud as a trend with the potential to impact the capture market, he identifies a potential stumbling block—bandwidth.

“If you scan a full color multipage document, it could be a 100MB file, and to move that into the cloud, process, and bring it back down again, for verification, that’s a little impractical when you’ve got bandwidth limitations,” said Gribble. “It will take some time to mature and develop, but it’s an obvious next step for some

of the capture solutions and one we’re very aware of.”

Meanwhile, PSIGEN’s Johnson offers a different perspective regarding trends.

“Despite technology, companies continue to struggle to manage paper in many basic business processes,” said Johnson. “Therefore, we have noticed that implementations have become focused and more vertical (i.e., accounts payable, human resources, mortgage processing, sales automation, legal discovery, medical, etc.) across a broad spectrum.”

Johnson also sees the adoption of more advanced capture techniques such as advanced data extraction, classification or “learning-type engines,” mobile capture, and integration or migration into multiple databases such as Microsoft SharePoint, Office 365, Square 9 SmartSearch, DocuWare, M-Files, FileBound, and others.

“[These] are stimulating an upsurge of investment into higher-end capture products,” stated Johnson.

Final Thoughts

When one considers the huge installed base of customers from SMBS to enterprise, with MFPs that can reap immediate benefits from a scan-and-capture solution, there’s no denying this is a solutions opportunity that can’t be ignored.

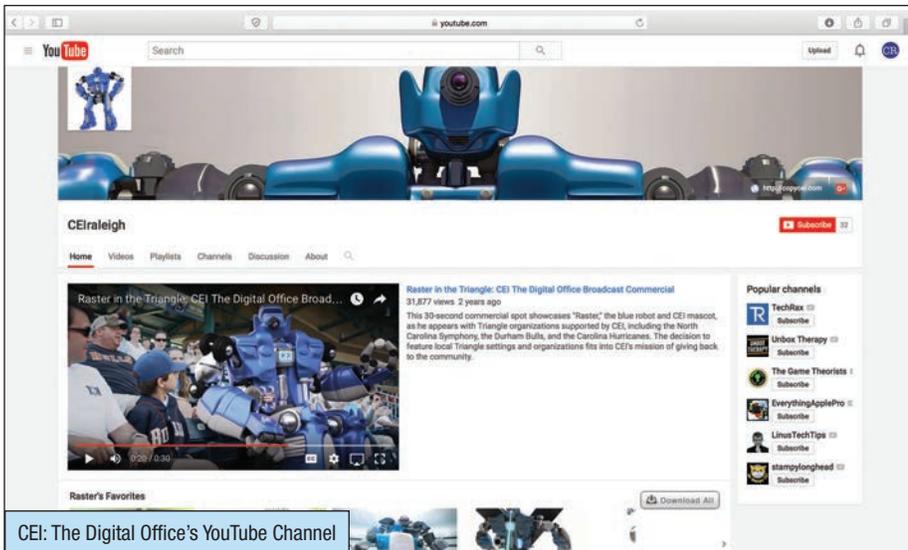
As with any software solution, the challenge is tapping into the market opportunity while acknowledging that the sales cycle may be longer compared to the traditional hardware sale. Still, the potential margins make it worthwhile.

And that’s a good thing for a channel that should always be looking to add value to the hardware sale.



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CEI: The Digital Office's YouTube Channel

social media if their buyers are there. Evidence of non-participation is just as visible as presence. Salespeople will inadvertently deliver a negative message with their absence. Put simply, sales professionals must answer their social phones.”

While having a website is a no-brainer at this point, social media continues to be a moving target, leaving dealers plenty of space to test out the numerous platforms to see what gains traction or not. While there is no one answer to a social media strategy, all dealers need to be considering how to approach social media and how they can continue broadening their social media presence.

Rules of Engagement

At Vision Office Systems in Charlotte, North Carolina, personal customer relationships are still the main driver of the company’s business. While many dealers are encountering drops in page clicks and a more challenging hardware sales environment, Vision Office Systems isn’t experiencing those trends. At the same time, there’s no doubt the workplace technology industry is changing. And Jason Habbal, vice president of marketing and sales, wants to be sure clients know Vision Office Systems is tech savvy and the right choice as a partner.

About four years ago, Habbal turned to social media to increase Vision Office Systems’ brand awareness. He was looking to expand their story beyond the company’s website.



Marco Technology's Twitter Page

back to your website where you can convert them [to a sale],” said Fitts. “But social media isn’t a silver bullet. It can’t stand alone. It really has to be connected to the other [marketing] efforts going on.”

The biggest key to optimally leveraging social media is content. According to Fitts, people are more likely to read helpful content, whereas they’d simply glance over an advertisement.

“You don’t just want to be out there talking about printers,” said Fitts. “You need to offer comprehensive content to help customers understand your smarts.”

A natural fit for where social media fits within dealers’ organizational structure

are their marketing department, and Fitts recommends dealers either “learn it, hire it, or outsource it, if they don’t have it in-house.”

“Opting out of social media may cause real damage,” wrote IDC (International Data Corporation), a global marketing intelligence firm, in a recent white paper on social media. “Salespeople should recognize that they can’t opt out of

“Opting out of social media may cause real damage,” wrote IDC. “Salespeople should recognize that they can’t opt out...if their buyers are there... Put simply, sales professionals must answer their social phones.”

“What I really wanted to do was create a strategy to get the brand out there,” said Habbal. “I don’t necessarily need it to create sales, but that’s great if it does. With the limited advertising we do, I wanted to use Facebook, LinkedIn, and Twitter to establish brand recog-

dition in our market and potentially reach new clients.”

According to Social Media Examiner, Facebook, Twitter, and LinkedIn, respectively, are the three most commonly used platforms companies that are looking to broaden their social media presence use. In fact, Facebook is exactly where Habbal began with Vision Office Systems’ foray into the digitally social foray.

“I wanted to find a way to engage the people I knew and reach the people they knew,” said Habbal.

On Facebook, Habbal’s content strategy is more off the cuff, driven by blog posts, recent media coverage, issues that Habbal is keyed in on, and the occasional cartoon that would make his audience laugh. His primary objective is to highlight any information that brings awareness to the different solutions and services the company provides for its clients.

When it comes to LinkedIn, Habbal’s approach is conversely more business-focused. Here, he posts employment opportunities and articles that resonate with Vision Office Systems’ message. Through this social media avenue, Vision Office Systems has been able to garner more luck in attracting qualified applicants for employment. Habbal stated that applicants found through LinkedIn tend to be better prepared for interviews, as well as have a better sense of the company’s culture and business.

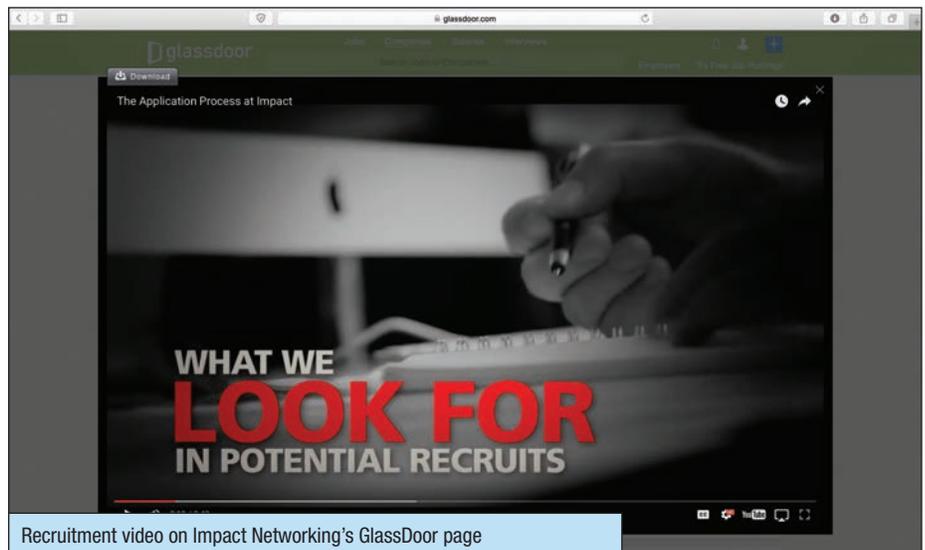
Linking Sales Reps to Customers

Two years ago, when T.J. DeBello, Stargel Office Solutions’ vice president of sales and marketing, looked to launch his company into the social media stratosphere, he also turned to Facebook, Twitter and LinkedIn. He recognized the power social media could lend to connecting Stargel to its current and prospective clients, as well as for fostering the company’s culture among employees, complementing the company’s robust website.

Based in Houston, Texas, Stargel mainly uses its Facebook site to communicate



Stargel Office Solutions’ Facebook page



Recruitment video on Impact Networking’s GlassDoor page

employee-based news such as promotions, employee events, and company awards. DeBello said most of its 200-plus Facebook page followers are employees, who regularly comment on the posts and photos, which helps create a positive work atmosphere.

However, DeBello’s social media strategy reaches beyond simply maintaining Stargel’s company culture.

“Back in the day we did a lot of radio advertising,” said DeBello. “The idea wasn’t

necessarily to get someone to pick up the phone and say, ‘I want to buy from your company.’ It was more so when the rep walked in, the customer would say, ‘Yes, I’ve heard of you.’ That’s our strategy now with social media. We want people to say they’ve heard of us and know that we’re tech savvy and use social media.”

Habbal stated that applicants found through LinkedIn tend to be better prepared for interviews, as well as have a better sense of the company’s culture and business.

According to research by IDC, online social networks play a vital role in the purchase process of 84% of the most senior B2B buyers. Even more pow-

The rise of digital communications has eroded the face-to-face sell:

- **98%** of sales reps with 5,000+ LinkedIn connections achieve quota.
- **72.6%** of salespeople using social media outperformed their sales peers.
- **54%** who used social media tracked their social media usage back to at least one closed deal.
- Only **4%** of buyers have a positive impression of a salesperson contacting via a cold call.
- **87%** of buyers have a favorable impression of a salesperson introduced to them through a social network.

Sources: www.business2community.com, Sales Benchmark Index and Social Media and Sales Quota Survey via Sheri Fitts of ShoeFitts Marketing

erful, the IDC has found that the rise of digital communications, including email, blogging, and social networks, has eroded the opportunity of the face-to-face sell. Nearly 50% of the purchasing process for technology solutions is complete before a salesperson becomes involved. As buyers' seniority, purchasing budget, and number of purchase decisions increase, they are more likely to use social media to improve the quality of their purchase decisions, according to the IDC.

"More and more companies are already more than 50% through the buying cycle

by the time they get to us," said DeBello. "They have Google at their fingertips. They can do a lot of research on competitors themselves."

By maintaining a social media presence, customers can see not only content Stargel is providing on its various media outlets but also customer reviews of the company and its services.

DeBello reports that Stargel gets more hits on its social media sites after a rep visits. The company is focusing its efforts on bringing its sales reps' LinkedIn profiles in line to tell the Stargel story in a fluid and cohesive manner, rather than appearing like a resumé (which is often the case on LinkedIn).

For content, DeBello emphasized the company is looking to develop a more consistent content strategy. Stargel produces a monthly newsletter that is already delivered to 2,000 recipients.

"You have to be consistent," said DeBello. "We do the newsletters, but we're not consistent about tweeting out the info or posting to LinkedIn. It would be nice for people to see a consistent presence."

Without an onsite marketing department, DeBello said Stargel is currently considering hiring an outside consultant with social media expertise to generate constant, fresh content for the company's social media avenues.

In the meantime, Stargel is gearing up for its annual baseball game in partnership with the Houston Astros. Moving from a manual registration, the company will be offering prizes tied into following Stargel on Twitter and Facebook. Working with a marketing company, Stargel is aiming to sort through those new followers to determine those who

are looking for additional information about working with Stargel and those that could be potential gsales leads. Over the nine months following the event, DeBello's goal is to use all of that information gathered to determine which social media platform and strategy will be most valuable to further develop.

Establishing the Right Contacts

Like Stargel, New York's LDI Color ToolBox is also still developing its social media strategy. According to Rebecca Blaine, LDI's director of marketing, the company crafted its first social media business plan in 2011. After thorough internal conversations, LDI opted to hire an outside marketing agency to build out its social media efforts.

"Their approach was to focus primarily on Facebook and their strategy was primarily to gain followers," observed Blaine. "We quickly realized that although gaining followers was important, we had the right idea in our own internal business plan: to focus not just on Facebook, but also on other social media sites such as LinkedIn, Twitter, and Instagram."

LDI brought its social media strategy back in-house to attempt to gain the "right" followers and engage them in a more meaningful—and potentially profitable—conversation. For LDI, the right followers are potential or current customers.

"Our long-term strategy has been for our followers to think of us as thought leaders and use our site to find meaningful and relevant conversation," added Blaine.

"Our long-term strategy has been for our followers to think of us as thought leaders and use our site to find meaningful conversation," added Blaine.

According to Blaine, the kind of investment necessary to achieve success on social media depends on what a company is looking to achieve. If the goal is to solely gain a following and maintain that following

through regular posts to social sites, then she believes a substantial investment isn't vital. However, to establish leadership among competitors and within the industry, companies should be ready to spend.

"If your goal [as a company] is to be recognized as a thought leader and to be able to measure a percentage of increased business that you obtained solely derived from social media programs, then, in our opinion, your investment will need to be more," noted Blaine.

To keep LDI's social media postings fresh, Blaine said the company has scheduled monthly brainstorming sessions in the past. More recently, LDI hired a new marketing employee, who is being groomed to take over and lead LDI's social media strategy.

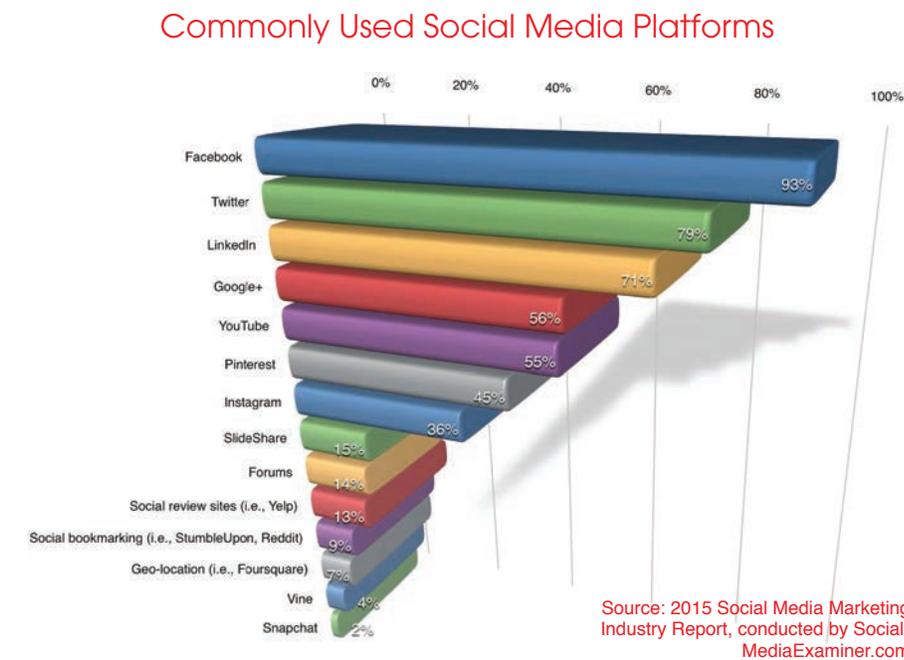
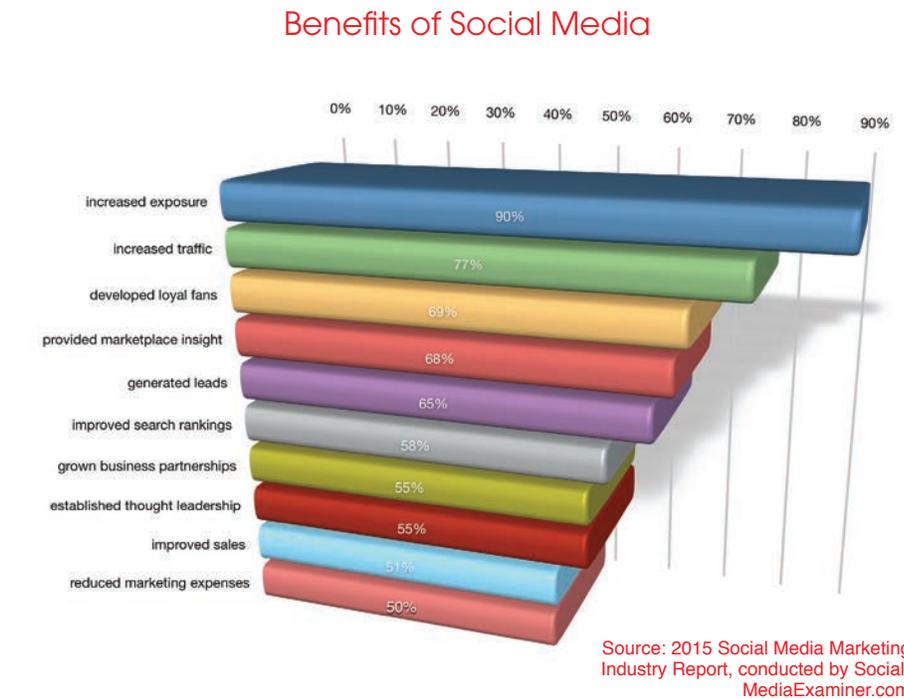
However, even though one person will be tasked with heading up the company's social efforts, Blaine views employee involvement as critical. The company has even set up a dedicated email address for employees to communicate their ideas for social media.

That said, "employee involvement has always been a challenge," as acknowledged by Blaine. "We try to keep them informed and encourage them to send any relevant social info to us."

Thought Leadership

In 2010, Marco launched its Facebook page as its first step into social media. However, this dealer, based in Saint Cloud, Minnesota, viewed social media as an extension of its extensive marketing efforts from the very beginning.

Marco's social media strategy is rooted in content. Most specifically, the company produces three blogs—CEO Jeff Gau's Leadership Blog, Chief Technology Officer Steve Knutson's CTO Insider Blog, and the company's Technology Insights Blog—totaling five posts per week. Postings from these three blogs fuel Marco's social media content. Every blog posting is promoted across Marco's primary so-



cial media platforms: Facebook, Twitter, and LinkedIn.

The company also partnered with an outside digital marketing consultant to begin receiving continuous guidance on social media strategy and execution. One of the recommendations was to develop a "social squad," which comprises 10 to 12

employees to represent Marco's 48 locations. The group meets once a month to discuss the company's social media activities and hone in on any particular events at Marco or in a particular office they'd like to showcase online.

"The purpose is not only for people to feel our culture, but it's also important for em-

ployees to know what's going on in other locations too," said Patty Funk, Marco's director of marketing. This strategy keeps both customers and employees engaged and informed.

With 13 employees working on Marco's in-house marketing team, Funk believes it is everyone's responsibility to stay on top of the company's social media efforts. However, there is one dedicated employee who oversees social media, leading the social squad and monitoring activity.

Marco has taken a tiered approach to expanding its social media presence. The company began with Facebook in 2011 and 2012 by building its brand and fostering its culture to communicate with its ever-growing community and employees. In 2015, Marco turned its focus to Twitter to communicate real-time, instantaneous news in the technology industry such as the company's presence at trade shows. This year, the company is honing in on LinkedIn to enhance its sales reps' social selling strategy, helping them connect with customers.

For Marco's LinkedIn efforts, the company's social squad, online marketing specialist, and consultant work hand-in-hand with the sales reps to tailor their LinkedIn pages accordingly. Marco wants its reps' pages to cohesively tell the Marco story in their own voices, as well as build in key words for effective search-engine optimization.

"If you take them [all the social media sites] all at once, it's kind of an animal," said Funk. "If you take it chunks and get it going and get some momentum, it gets easier to roll out the next one [platform]."

In the past six years on social media, Marco's focused efforts have paid off. In 2015, the company garnered over 5,000 followers on its Facebook page, gaining 2,000

followers last year alone. In addition, the company has been able to measure what works and what doesn't.

According to Funk, contests to win tickets to community events such as Green Bay Packers games are big drivers for Marco's social media sites and so are community service posts. For example, the company will post a goal to gain a certain number of "likes" on Facebook, as well as pledge to make a particular donation if the goal is met.

Additionally, the company's blog posts reached over 100,000 views in 2015, tripling from two years ago. This effort alone has established Marco not only as a service provider but also as a thought leader in the communities Marco serves and the industry at large.

Company Culture Club

Four years ago, Impact Networking made a calculated decision to enhance its web presence through social media. Headquartered in Lake Forest, Illinois, the company wanted to facilitate its culture and buoy its recruitment efforts. Today, under Chief Marketing Officer Michael Borchew, a team of three employees—Marketing Director Rebecca Adolf, Digital Marketing Specialist Kaitlyn Fisher, and Digital Marketing Assistant Megan McClafferty—work in sync to specifically craft the company's social media strategy.

Adolf focuses primarily on the graphics aspect, while Fisher and McClafferty are charged with content, writing press releases and articles for posting across the company's platforms. Together, the three women are continuously honing the company's strategy, while paying close attention to analytics, search-engine optimization, and key words.

"Social media does drive a lot of traffic to our website through their links," said Adolf. "Besides our main page, one of our strongest pages is our 'Careers' section."

In addition to the company's website, Facebook, and LinkedIn sites, Impact Networking places a strong emphasis on GlassDoor.com, which is similar to Yelp for businesses.

"We maintain that webpage and monitor it closely," said Adolf. "We put up all our information on benefits, as well as events." The company is rated "4" on a 5-point scale on GlassDoor.com.

For content, Adolf said the company uses any timely news as an opportunity to reach out on social media. As an example, the company was awarded first place for the small business category in the 2015 Chicago Tribune's Best Places to Work survey in November. Impact Networking then set about spreading this news across every social platform, as well as issued a press release and a paid advertisement. These efforts garnered extremely high activity by viewers with over 20,000 engaged. The social media campaign connected to this single event made over 38,000 total impressions.

As part of Impact Networking's suite of services the company offers to clients, Adolf, Fisher, and McClafferty work to help clients develop their marketing strategies. Regardless of the platform, they emphasize the importance of content. Once the overall business goals for a digital strategy are identified, a content plan must follow. According to Fisher, the main goal is to drive leads for business.

"Without any good content, social media is very hard," said Fisher. "Coming up with content that drives business leads is very important—such as gated content like webinars or case studies, something where we can exchange information for that content. Social media is a really good distribution channel to reach very targeted audiences. We see this more through the paid aspect such as promoted posts through Facebook and LinkedIn. You



can be very specific about who you want to reach. We are working with clients to come up with content that will make a business impact with social media.”

Covering All the Bases

Seven years ago, CEI: The Digital Office’s CEO and President Blake Alford brainstormed a new logo for his company in Raleigh, North Carolina—a transformer-like robot named Raster. After a designer brought Alford’s image to life, the blue robot became CEI’s mascot and a key image for every aspect of the company’s marketing. Raster has appeared on everything from shirts and wine bottles to billboards and commercials.

“We are now known as the robot company of North Carolina,” said Alford, who strategically places advertisements to cover as many demographics as possible at both sporting and cultural events.

When Alford dove into social media two years ago, it was clear Raster would play a starring role. His image appeared all over Facebook and Twitter, enhancing CEI’s brand awareness on an even broader scale.

Alford keeps his social media content light and candid, often using hashtags to connect to other people posting on similar themes. Recently, Alford posted an old VHS tape on “Throwback Thursday,” featuring the hashtags #ThrowbackThursday and #bekindandrewind, as well as linking to @Sony and @Netflix. All the while, Alford is very mindful not to offend his followers and refrains from posting anything religious or political. His aim is to create a compellingly fun atmosphere online to attract and engage viewers.

Alford also showcases CEI’s charitable efforts on social media, highlighting the company’s relationships with numerous organizations, including ALS Association, American Red Cross, and SPCA,

among several others. According to Alford, social media is the perfect place to post photos of the company’s monthly volunteer days and allows him to advertise how CEI is directly involved within its community.

However, the most tangible byproduct of social media has been with attracting new talent to CEI.

“The benefit of social media is that it’s increased our recruiting, which is paramount,” said Alford, who cited a recent new employee who explicitly stated that the company’s positive social media presence was a key factor in his decision to join CEI.

Video social media platform YouTube has also featured prominently in Alford’s digital strategy. The company invests a substantial amount to sponsor “pre-roll,” which is the paid advertisement that runs before a YouTube video. CEI’s pre-rolls run for videos streaming within a 100-mile radius, its primary target sales area.

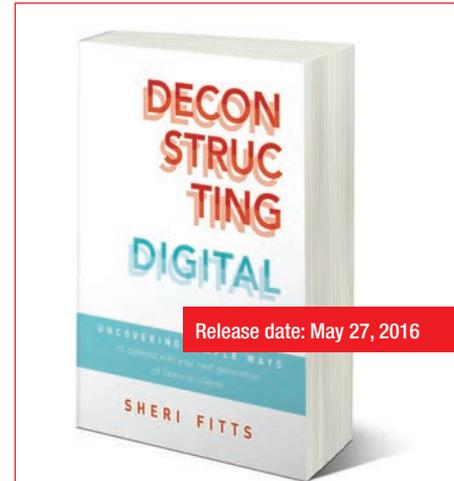
Alford and his sales and events coordinator Anna Groblewski spend about two to three hours per day on CEI’s social media activities. Alford focuses on Facebook, while Groblewski handles Twitter. This amount of time falls in line with Social Media Examiners data that indicates that 90% of companies using Facebook, and 69% on Twitter, dedicate one to five hours of time to their efforts on the platform.

When CEI began its efforts in 2014, its Facebook page had about 40 followers. Today, there are over 700. The company also has over 700 followers on Twitter.

Even more powerful, CEI has doubled its revenue from \$10 million in 2008 to \$20 million in 2015.

“When you see our commercials, there are

no calls to action,” said Alford. “They’re just fun and creative. The whole point behind our social media and branding is to be top of mind. I want customers looking to getting an office equipment system or technology or solutions, I want them say, ‘I’ve obviously got to call CEI.’ If they think that, then I have the talent here to win the business.”



Deconstructing Digital by Sherri Fitts

In “Deconstructing Digital,” Sherri Fitts reveals the strategies to remain within the lines to which readers may be constrained and really rock social media platforms to connect with target clients and prospects. Fitts also provides readers with the resources to understand the digital world, clarify their messaging, communicate with a new generation of clients, and learn to make social media work for them.

More Sources to Consult:

IDC Report on Social Media, sponsored by LinkedIn

Social Media Examiner: Social Media Marketing Industry Report 2015



Questions About This Story?

Contact Sharon Esker via email: SEsker@CannataReport.com.



Valerie Briseno

A Positive Force Behind the BTA

By Scott Cullen

ACKNOWLEDGING CONTRIBUTIONS OF WOMEN ACROSS OUR INDUSTRY



VALERIE BRISENO
Membership Marketing Manager,
Business Technology Association
(BTA)

If you've ever attended a BTA district event or a dealer meeting where BTA is exhibiting, you've likely run into Valerie Briseno, BTA's membership marketing manager. And if you've ever taken the time to speak with her, you've likely met one of the most engaging, upbeat people in our industry.

Her role as BTA's membership marketing manager is perfectly suited to Valerie's personality and background. Dealers love her, vendors love her, co-workers love her, and anyone who has ever visited the BTA booth at an industry event or function where BTA is exhibiting is captivated by her professionalism and charm.

"Valerie has always proven to be a tremendous asset to BTA," stated BTA Executive Director Brent Hoskins. "She is held in high regard by both our dealer and vendor members, working particularly close with our sponsoring exhibitors at BTA's district-hosted events. It is clear to me that our exhibitors enjoy working with her at our events. I've seen 'Valerie is great' written on exhibitor event evaluation forms for years. Those who know Valerie are well aware of her unending dedication to supporting our members in any way possible, always with a smile on her face."

"Valerie is dedicated to every BTA Member as well as all industry participants," added BTA General Counsel Bob Goldberg. "With her marketing, organizational, and implementation skills, the BTA District Events have grown to become 'must attend' conferences. Valerie's com-

"I've seen 'Valerie is great' written on exhibitor event evaluation forms for years. Those who know Valerie are well aware of her unending dedication to supporting our members in any way possible, always with a smile on her face," said Hoskins.

mitment to BTA is only surpassed by her love for her son, Charley."

Lou Stricklin, director of marketing and sales support at Muratec America, Inc., has worked closely with Valerie over the years and is another fan.

"I've had the pleasure to work with Valerie Briseno for over 10 years," said Strickland. "The knowledge, passion, and dedication she brings to the BTA organization, and more importantly, the independent dealer community in which they serve, is constantly on display. BTA has evolved its programs, offerings, and events to coincide with the needs of our channel, and Valerie has been one of the driving forces behind this evolution. The dealer community and all BTA partners are fortunate to have such a dedicated advocate on their side."

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The Route to BTA

After graduating from the University of Central Missouri with a B.S. in Business Administration in 1998, Valerie took a job as a marketing coordinator for an aerospace company. After two years, she left to join a mortgage company where she worked as a loan officer for three years. She felt it was a good job and a nice fit for her talents. It was also where she met her husband. However, realizing that there can sometimes be too much togetherness, Valerie decided to look for another opportunity where she wouldn't be working so close to her husband. It wasn't personal, just a practical decision.

After responding to an ad in the local paper for a sales position at BTA, Valerie was called in for what turned out to be a three-hour interview with Robin Keller, BTA's former membership director. She nailed the interview and was hired. That sales position eventually evolved into her current role working closely with vendor members of BTA.

Job Description

An average day for Valerie will often find her on the phone talking to vendors, corresponding with them via email, or working with the association's peer groups like SDG. She also assists SDG in planning its three meetings a year. When she's not traveling to industry events, Valerie's focus is BTA's annual Channel's Choice report, as well as BTA's Benchmarking Series Reports, which are published every other year.

There's not much going on at BTA that Valerie doesn't have a hand in. She's instrumental in scheduling education workshops and even pitches in to proof articles for BTA's Office Technology magazine. She works closely with Mary Hopkins, BTA's database administrator, as well as Brian Smith, a membership sales representative whose primary focus is dealer memberships. Whenever Smith has a question or a dealer looking for research info, he knows exactly who to call—Valerie. When asked what she likes best about her

"I've had the pleasure to work with Valerie Briseno for over 10 years," said Muratec's Strickland. "The knowledge, passion, and dedication she brings to the BTA organization, and more importantly, the independent dealer community in which they serve, is always on display."

job, Valerie simply said being part of an association started by dealers for dealers. She claims to like everything she does for BTA, but when pressed, conceded her least favorite thing is having to say no to a vendor or dealer request. More often than not though, Valerie finds a way to fulfill most requests.

This year, Valerie is celebrating her 10-year anniversary with BTA. It's certainly a milestone and a commendable accomplishment, but who has time to celebrate when you're working diligently with the rest of the BTA staff on the association's 90th anniversary celebration set to take place in Kansas City in early June?

Back at the Office

It's a close-knit staff at BTA and everyone seems to get along, which is a good thing. Like Valerie, everyone is pretty much involved in all aspects of the business, from accounting to marketing, and then some. Valerie has kind words for her co-workers and was candid enough to answer the burning questions many of us have about Brent Hoskins. Most notably, what's it like to work around him every day?

"He's one of the nicest people on the planet," she said.

While the ratio of men to women in the industry still favors men by a wide margin, being among the few women doesn't bother Valerie. Most recently, she was the only woman among 17 men at the March BTA district event in New Orleans.

"I never notice it that much," she said. "I don't usually think about it until I see a woman in an executive position."

Being the only woman didn't rattle her at all. But she certainly took note.

Road Unwary

As part of her full-time position, she travels eight to 10 times a year. With so many responsibilities, one may guess it would be challenging for Valerie to keep up with her many responsibilities. However, she's doesn't consider the travel a burden and actually enjoys it. Her family—including her six-year-old son—doesn't mind her traveling either, but they sure are glad when she returns home. Her son turns seven in May. As an active boy with many sports-related activities, he keeps her on her toes.

"I love being a mother," she said. "I am missed, not just by my family, but my dogs as well. They get so excited whenever I come home."

For the record, she has a Lab that turns 14 in August and an 11-year-old toy poodle.

After a decade of traveling Valerie has acquired some tips along the way to make traveling easier. First and foremost, she's a firm believer in bringing everything in a carryon.

"I don't like to check my bag," she said, recalling how when she first began traveling for business she often packed too much. She's also believes that to make the most of these conferences, it's important to attend networking events such as cocktail receptions, parties, and dinners.

"Sometimes [the networking events] are more beneficial than the exhibit time," stated Valerie.



The Farmer's Daughter

Valerie grew up on a farm about an hour north of Kansas City. After her father suffered a stroke a year-and-a-half ago, Valerie and her family have stepped up to help out on the farm whenever their schedules allow—mostly on weekends.

Most recently, she was driving in fence posts by hand on the farm.

“You realize how out of shape you are when you do something like that,” she laughed.

It's also calving season, which brings with it a whole host of challenges. “We had a first-time mother not taking care of her baby, so we had to catch the calf and bring it in and feed it by bottle,” recalled Valerie.

Bringing up a calf can be a messy job, especially since they're not toilet-trained (neither are cows for that matter). Feeding a calf means straddling it and encouraging it to drink from a bottle with the understanding that you're going to get dirty. When a calf has to take care of business, they're going to do it whether you're in the line of fire or not. Valerie's willingness to roll with the call of nature while feeding the calf not only entertained but impressed her son Charley.

Fortunately, things don't get that messy in her day to day job at BTA.

When asked about her favorite travel destination, she started off by excluding Orlando and Las Vegas, the two most

Valerie encourages dealers and vendors to join her (at BTA's 90th Anniversary event) in Kansas City this June. “We're going to have a great educational lineup. Our keynote speaker is a Navy Seal. There's going to be lots of manufacturers there, and you will want to be here too.”

popular destinations for industry events. She prefers New York because that was the site of BTA's first district event. Actually, the location was White Plains in the New York metropolitan area, so close enough.

Looking Ahead

In the coming months, Valerie is committed to preparing for the BTA's 90th anniversary. Coincidentally, when Valerie started at BTA, the association was celebrating its 80th anniversary and the plans for that event were already completed when she started.

“I want to make sure it's a success,” said Valerie. “Now that [our district meeting in] New Orleans is out of the way that's our main focus. We're making it our national event so it's going to be a little longer with added education.”

Valerie encourages dealers and vendors to join her in Kansas City this June. “We're going to have a great educational lineup. Our keynote speaker is a Navy Seal. There's going to be lots of manufacturers there, and you will want to be here too.”

With the interview winding down, I asked what was on her schedule for the rest of the day.

Her plans included a recap of the previous week's district event, reviewing items discussed at BTA's board meeting, and dealing with various action items related to the 90th anniversary celebration. She'll also be catching up on everything else that she couldn't attend to while traveling last week.

Despite the busy week, Valerie maintains her positive attitude.

“I've been told that my entire life,” says Valerie about her cheerful demeanor.

Since position at BTA is customer-focused, a smiling face and a genial disposition is essential even when things aren't going as planned.

BTA and the office technology vendor and dealer community are fortunate to have Valerie Briseno in their corner—whether she's working out of BTA's Kansas City headquarters or meeting and greeting members and non-members alike at BTA district events and manufacturer dealer meetings everywhere.



Questions About This Story?

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Key Confirmed Industry Events Calendar (Q2 2016–Q1 2017)

Note that The Cannata Report will be represented at the events marked with an asterisk. To inquire about making a listing or which members of The Cannata Report will attend events as indicated, email cjcannta@cannatareport.com.

BPCA Spring Best Practices**
Atlanta Marriott Buckhead
Atlanta, GA
May 9–12
Register: www.businessproducts-council.org

Canon Road Show
TBD
Dallas, Texas
May 11–12

Lexmark 2016 Dealer Meeting*
Marriott Harbor Beach
Ft. Lauderdale, Fla.
May 9–11

KYOCERA FY2016 Annual Dealer Meeting*
Venue: TBA
Orlando, Fla.
May 16–18

Toshiba LEAD 2016*
Bellagio Hotel and Casino
Las Vegas, Nev.
May 16–18

CDA Service Meeting
Venue: TBA
Kansas City, Kansas
May 18–May 20
Register: cdainfo.org/upcoming-events/

Canon Road Show
Venue: TBA
Chicago, Ill.
May 25–26

DRUPA 2016*
Düsseldorf Exhibition Centre
Düsseldorf, Germany
May 31–June 10
www.drupa.com

2016 BTA National Conference*
Hosted by BTA Mid-America
InterContinental Kansas City at the Plaza
Kansas City, Mo.
June 8–10
Register: www.bta.site-ym.com

Canon Road Show
TBD
Irvine, Calif.
June 9–10

BTA at 90: A Celebration*
Kansas City Union Station
Kansas City, Mo.
June 10
Register: www.bta.site-ym.com

CDA CFO Meeting
N/A
New Orleans, Louis.
June 9–10
Register: cdainfo.org

HP Analyst Summit 2016
TBA
Boston, Mass.
June 21–22

Managed IT Sales Simplicity Seminars with Alex Rogers
GreatAmerica Headquarters
Cedar Rapids, Iowa
June 21 & 22 2016
Register: www.greatameric.com

CDA Summer CEO Meeting
N/A
Nashville, Tenn.
July 13–16
Register: cdainfo.org

Managed IT Sales Simplicity Seminars with Alex Rogers

GreatAmerica Headquarters
Cedar Rapids, Iowa
August 2–3, 2016
Register: www.greatamerica.com

BTA West
The Mirage
Las Vegas, Nev.
August 4–5
Details: bta.org

The Top 100 Summit*
Loews Corando Bay
San Diego, Calif.
September 7–10
Details: www.printaudit.com

KMBS Dealer Meeting 2016*
Various venues; additional details TBA
Aspen, CO
August 28–31

SGIA Expo 2016*
Las Vegas Convention Center
Las Vegas, Nev.
September 14–16
Register: sgia.org

Grand Slam
Hosted by BTA East
The Westin Copley Place
Boston, Mass.
September 15–16
Details: bta.org

Graph Expo 2016*
Orlando's Orange County Convention Center
Orlando, Fla.
September 25–28
www.graphexpo.com

Navigate 2016: Continuum's User Conference*
The Seaport World Trade Center
Boston, Mass.
September 28–30
www.continuum.net

BPCA 2016 Fall Owner Meeting
Meritage Resort
Napa, Calif.
October 2–6

The Cannata Report's 31st Annual Awards & Charities Dinner**
Westminster Hotel
Livingston, N.J.
Details: www.thecannatareport.com/Dinner31

CDA Fall CDA Meeting
Venue: TBA
Napa Valley, Calif.
October 12–14
Register: www.cdainfo.org

Encompass 2016: Square 9 Dealer Conference*
Opal Sands Resort
Clearwater Fla.
October 11–13
Details: www.encompassconference.com

Fall Colors Retreat
Hosted by BTA Southeast
Venue: TBA
Asheville, N.C.
October 21–22
Details: bra.org

Ricoh Dealer Meeting 2016*
Venue: TBA
Las Vegas, Nev.
October 24–26

The Jillian Fund's Second Annual Big Night Out*
The Venetian
Garfield, N.J.
November 2
Details: www.thejillianfund.org

EFI Connect Users Conference*
The Wynn
Las Vegas, Nev.
January 17–20, 2017
Register: www.efi.com/connect

*Denotes that one or more representatives from The Cannata Report will attend the event.

UP NEXT

By CJ Cannata

Frank and I are preparing for our third in a series of four dealer group (SDG,

CDA, BPCA, SDG) software panels at BPCA's Spring Best Practices Meeting in Atlanta and Toshiba's 2016 LEAD in Las Vegas, while Scott heads to Lexington and then Las Vegas to cover Lexmark's and KYOCERA's respective 2016 dealer meetings.

Next month, we are publishing an investigative piece on MWA's FORZA with SAP Business One and our first piece on dealer business modeling, a new area of coverage for us that is critical more than ever to the industry today.

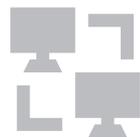
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