

SPECIAL REPORT

The Print e-Commerce Market: The Next Decade

By: Cary Sherburne

During the craziness of the dot-com era, the printing industry became a target for dot-commers convinced that they would be able to change the business forever. At the peak, print-related dot-com start-ups numbered in the hundreds and no doubt consumed billions of dollars in venture capital. The attraction, of course, was the \$100+ billion printing industry and, in many cases, the opportunity to extract revenue from each and every print transaction taking place in the market, either from the buy-side or the sell-side. What many investors failed to recognize was the importance of the relationships between printers and their customers and the reluctance of the printing industry to fling itself headlong into the rapid, dynamic change these solutions were attempting to impose.

The bottom line? Disintermediation between the printer and customer on a grand scale simply did not work. Thus, the landscape was littered with failed print-related dot-com companies. Now, after the passing of a half of a decade, a much smaller number of companies, mostly private, still survive and have refined their business models over the years to provide a set of services more tuned to market needs.

In this Special Report, Cary Sherburne, WhatTheyThink Senior Editor, takes a look at a sampling of the companies that play in today's print e-commerce market, including their offerings, business model and pricing philosophy. This is by no means an exhaustive market survey, but is designed to offer a glimpse into a set of solutions that has, in fact, caused significant change in the process of buying print. This report provides an overview of the current state of the market, a comparison of the offerings reviewed and offers a brief profile of each.

The Market: Four Categories

Today's print e-commerce solutions fall into four general categories, although in researching this Special Report, it is clear that most suppliers cross over between categories to some extent; thus the lines are blurring in terms of how the offerings are brought to market by various suppliers. However, the lines are still fairly clear in terms of how users are implementing the solutions.

The categories we explored are listed below, including a list of the vendors we spoke with that have offerings in each:

- Internally owned and operated (licensed software)
 - EFI
 - NowDocs
 - Press-Sense
 - Printable
 - Rochester Software Associates
- Hosted solutions focused on total print management
 - Cirqit
 - EFI
 - Print Vision
- Hosted solutions utilized by the print service provider (internal or external)

- EFI
- NowDocs
- Printable
- PrintVision
- Prismatek
- Sequiam

- Print service providers with proprietary Web2Print interface
 - Kinko's
 - Mimeo

The final category, print service providers with a proprietary Web2Print interface, includes a large number of providers beyond the two we included for comparative purposes, including PrintingForLess, PSPrint, VistaPrint, and more. What differentiates this category is the fact that services are generally designed to drive print volume to captive print production operations, with the cost of deploying and maintaining the web-based technology wrapped into the overall cost of print as opposed to being offered as a separate, fee-based capability. By this definition, in fact, any print service provider with a Web2Print interface would fall into this category.

This list and Figure 1 (on the next page) clearly reflect the blurring of the lines in terms of suppliers and segments.

Pricing and Strategic Positioning

In taking a closer look at each of these individual solutions, the key elements we investigated included pricing strategy, deployment process, installed base and other information that differentiates the offerings.

Print Procurement Management

Figure 2 (on the next page) is a summary of the Print Procurement Management offerings reviewed. These offerings view the corporate enterprise as the customer and

Figure 1 Providers by Category

	Licensed	Print Management	Hosted	Proprietary
Cirqit		X		
EFI	X	X	X	
FedEx Kinko's				X
Mimeo				X
NowDocs	X		X	
PressSense	X			
Printable	X		X	
Print Vision		X	X	
Prismatek	X		X	
RSA	X			
Sequiam			X	

are designed to ease the print procurement process across multiple suppliers and add value by making it easy to compare pricing, track print spend, and improve productivity in the print specification process.

Hosted Software Solutions (ASP)

These solutions view the printer as the customer. The supplier provides the software application, hosting services, customized implementation and other related services for a fee. While many of these providers offered a transaction-based pricing model during the dot-com boom, most of the surviving companies have implemented a subscription, rather than a transaction-based, pricing model. Experience would indicate that printers generally do not like the less predictable transaction-based model and would prefer a fixed cost each month. Printers often view the transaction model as a "tax."

Many of these solutions are also offered in a licensed software model for customers who prefer to maintain the server inside the firewall. Companies listed here offer hosted applications as their primary business model.

Figure 3 (on the next page) is a summary of these solutions.

Licensed Software Solutions

These solutions, sold to both internal and external print service providers, are managed and operated by the

customer and are generally bundled with a server. Post-implementation, the customer takes full responsibility for operations while the supplier provides software updates in accordance with a maintenance agreement.

It is becoming increasingly common for pure ASP providers to offer a server model as an alternative, either to comply with security requirements or to accommodate other special customer requirements. Figure 4 (on the page 4) is a review of a subset of these offerings.

Proprietary Solutions

FedEx Kinko's and Mimeo are two examples, among many, of proprietary job submission solutions that are directed at a captive print capability. In the case of FedEx Kinko's, there are some 1,200 retail centers and about 50 closed door production hubs.

Figure 2 Print Procurement Management

	Cirqit	EFI	PrintVision
Product(s)	Job Submission, Order Management, and Contract Management capabilities integrated into a single offering	Printellect (formerly Enterprise Site)	PrintVision Procure, PrintVision Paper, PrintVision Managed Services, PrintVision Catalog
Services	Management of contracted services including commercial print and other indirect procurement	Specification of complex print projects and transmission of specifications to one or more printers for quotes; project award; and project management through the production process.	Print management and consulting for client print procurement utilizing PrintVision's suite of products
# Clients	Declined to specify	20	Approximately 24
Sales Model	Direct sales, with a focus on selling through partners	Direct sales	Direct sales, IKON as a channel and reference selling by partners
Estimated First Year Cost	\$100,000 to \$400,000, with track record of reducing a customer's spend by 20% over pre-implementation year. No mark-up on print procured.	Declined to specify; each Printellect sale is quoted separately	Percentage of cost of print procured or percentage of savings accrued
Pricing Model	Software license fees, services fees for implementation, hosting, maintenance and support. Pricing established based on amount of projected spend	Declined to specify; each Printellect sale is quoted separately based on client requirements	A blend of license and transaction fees based on client requirements
Target Customer	>\$2 million annual print spend	Large corporate enterprises who wish to manage print procurement and work with multiple print vendors from a single interface	>\$1 million annual print spend
Consulting Services?	Y	N	Y
Example Customers	Delta, Nestle, Black & Decker, Lexmark, J.P. Morgan Chase, John Deere	Declined to specify	Prudential, Starwood, American Cancer Society, Staples, IKON
Key Partners	IBM Global Services, RR Donnelley, ICG Commerce, AT Kearney	N/A	Adobe, Plumtree, Crystal Reports

Figure 3 Hosted (ASP) Solutions

	Product(s)	Target Customer	# Sales Reps	# Customers	# Transactions /Mo	Base Implementation Fee	Pricing Model	Fee Schedule
EFI	Printchannel	Small Printer	25	110	30-50K	\$15-25K	Transaction	Based on volumes, complexity; average \$5/thousand
	PrintSmith Site	Small Printer		100	15K	\$2.5K	Subscription	\$200/month
	PrinterSite Internal	Mid- to Large-Sized Printer		70	Not reported	\$4.5K	Subscription	\$1,000/qtr (5 sales people)
	PrinterSite Fulfillment	Mid- to Large-Sized Printer		20	Not reported	\$4.5K	Subscription	\$1,100/qtr; incl 10 MIS us 3 sites (2 live, 1 demo); additional sites \$350/qtr in bundles of 5
	PrinterSite Exchange	Mid- to Large-Sized Printer		10	Not reported	\$4.5K	Subscription	\$1,375/qtr incl 10 MIS use unlimited customer sites, GB storage
NowDocs	NowPrint ASP	Large enterprises	6	NowPrint ASP: few; NowPrint Server: 81; total with NowChecks, NowForms: 3,000	Not reported	Few instances; priced on a case-by-case basis	Subscription	Few instances; priced on case-by-case basis
Printable	Printable Dashboard, PrintOne Customer Center	Commercial/quick print >10 empl	12	450	10's of thousands; declined to be specific	\$7K	Subscription	\$270 to \$1,000+/mo base on complexity
PrintVision	WebPrint	In-Plant	3	Unknown	Not reported	Currently under review	Subscription	Currently under review
Prismatek	Print <i>THAT!</i>	Small to mid-sized printers, migrating to larger printers with Enterprise Server	2	400+ companies; 7000+ users	6.5K	\$1,400 to \$2,300 for subscription service	Subscription	Monthly subscription from \$340 to \$1,000+ depending on end user seats and complexity
Sequiam	Print It, 123!, Scan It, 123!, Manage It, 123!	In-Plant, education	6	10	Not reported	None	Transaction	\$3,500 for 1 million impressions; discounts based on volume

In the case of Mimeo, a single production facility is located at the foot of the FedEx runway, serving all of North America. These two are addressed together because of the similarity of their offerings, in that there is no charge for the job submission software; rather, costs are covered by the cost of the print itself and the solutions are designed to drive increased volumes to their respective print centers. In the case of Mimeo, web job submission is its sole source of print volume. In the case of FedEx Kinko's, of course, web job submission supplements its walk-up retail and corporate contract business. Both companies offer online storage for easy sharing and reprinting of documents.

FedEx Kinko's, in partnership with Microsoft, developed File-Print-FedEx Kinko's, called FPFK. It requires the download and installation of a 30-megabyte print driver which allows customers to print files to any Kinko's retail location from within the native application, specifying all job characteristics, including payment. The job is presumably delivered directly into the print job queue. FedEx Kinko's reports that it has seen about 2,000 downloads of the driver per week since the product was launched but declines to disclose how many customers are using the solution. FedEx Kinko's also allows customers to upload files directly via the web from the FedEx Kinko's website. Users report varying levels of satisfaction with electronic

job submission, often feeling the need to establish contact with the Kinko's store to verify that the job has been received and that it will be available as requested.

Mimeo also offers a print driver for download which installs Mimeo as a printer on the user's computer and enables file/print simplicity for the submission of work to Mimeo. Mimeo's driver offers WYSIWYG job views, including covers and binding, so that users can proof the job online. It also offers instant pricing. With a single print center, Mimeo has focused its efforts on exceptional customer service and zero defects, and has gained a following in the corporate community, especially among training

Figure 4 Licensed Software Solutions

	Product(s)	# Sales Reps	# Customers	Base Pricing
EFI	Digital Storefront Express, Digital Storefront	25	400	Express: \$8,995 software only; DSF: \$15,995 software only
NowDocs	NowPrint Server	6	81	\$25-35K, including server
Press-Sense	iWay Prime	7	250	\$30-50K, including server
Printable	On-Site Server Edition	12	10+	Not reported
Prismatek	Print THAT! Server Edition	2	Not Reported	Starts at \$18 to \$22K with 100 seats and is theoretically expandable to an unlimited number of users
RSA	WebCRD	5	50 to 60	\$8-50K depending on configuration

professionals who like the convenience of storing training materials online and compiling classroom sets on demand. Being located at the foot of the FedEx runway means that jobs submitted by 10 PM Eastern time can be delivered almost anywhere in the U.S. by 8 AM the next day. Mimeo's \$0.99/page color and \$0.07/page black & white list price is designed to recoup costs of the user interface, production and customer service. Shipping is incremental, with little or no mark-up. Mimeo expects to release a new .NET-based platform in early 2005, the first complete rewrite of the system since its launch, although the company has regularly incremented functionality during that time. Mimeo, privately held, reports significant double-digit year-over-year growth in the 30% to 50% range.

Although the print e-procurement market is still undergoing significant change, one thing is certain: the successful printer of the future must incorporate an effective and automated web-based customer interface and workflow. And the successful supplier to the industry will offer a range of solutions to meet the widely varying needs of the market into which they are selling. The fact that most suppliers are recognizing this need is evidenced by the shifting nature of their offerings.

Print eCommerce Profiles

Cirqit

When Cirqit was founded during the dot-com boom of the 1990s, the company marketed hosted software solutions to the Global 500 that were focused on more efficient procurement of commercial printing. Since that time, Cirqit has expanded its focus to the Global 2000 and added a significant services component to the mix, including Strategic Planning & Sourcing, Procurement Outsourcing and Commodity Management services that are delivered by an experienced team of print procurement professionals who identify opportunities, develop a comprehensive strategy and drive execution.

Today, Cirqit's business mix is split between hosted procurement and outsourced procurement, with the latter activities being performed by Cirqit, rather than customer, resources. Cirqit expects the mix to shift toward outsourcing in the next year in alignment with the expanded demand for outsourcing services. With headquarters in Whippany, NJ and offices in Santiago, Chile, Mexico City; and Zurich, Cirqit is working to add cross border, cross currency price comparisons within the coming year as it expands its reach in Europe and Asia.

Underlying all of Cirqit's activities is the strategic intent of helping customers to get more spend under management. Cirqit claims an ongoing track record of reducing a customer's price paid versus the prior year by in excess of 20% during its first year of implementation, with hard cost savings, not process savings. The company does this by combining its technology with the domain expertise resident in its consulting and services arm to optimize supply chain management. Cirqit reports that clients can expect to see a 1%-3% quarter over quarter incremental savings in subsequent years due to increased efficiency in the process for both the buyer and the supplier. The company claims that typically within 90 days of start, the solution can be fully implemented with documented savings, and deliver an ROI within six months of six to ten times the initial cost of the Cirqit services.

Cirqit's technology allows buyers to easily place and track orders, and dynamically price those orders based on contracted matrices that are updated quarterly or as agreed with the supplier. Using its large database, Cirqit is able to benchmark the current print spend and assess the existing supplier base across the enterprise. By streamlining the supplier base to the most cost-effective and efficient printers, printers can benefit by gaining increased volume and customers can benefit by receiving reduced prices in exchange. Cirqit is developing an invoicing module that will allow suppliers to automatically invoice, including freight, taxes and other miscellaneous charges.

EFI

EFI got its start as a color management software company, but is best known as a manufacturer of RIPs for digital copiers and printers, and its Fiery server family enjoys a dominant market position today. Over the last few years, EFI has expanded its offerings beyond the RIP hardware/software solution set, largely through acquisition, including Best Color (proofing), T/R Systems (MicroPress and Digital Storefront) and Printcafe (MIS and print e-procurement solutions). Today, the company is very much focused on software development, which in some ways is a return to its roots. It is EFI's stated intent to invest in further development of its software offerings to ensure standards compliance and more integration across the entire product suite.

In so doing, EFI is leveraging its development efforts across multiple solutions to reduce time to market and enable rapid deployment of new features across the board. EFI's perspective is that 60% of the customer requirements are the same for facilities management (FM), in-plant printing, print-for-pay and medium to large commercial print, with the other 40% perhaps being unique by environment. While EFI is leveraging common technologies across all products, the company expects to continue to offer discrete solutions tuned to specific market segments.

EFI has over 300 sales people worldwide, primarily focused on supporting its channels for its other lines of business. The company has about 25 direct sales people involved in selling the former Printcafe and T/R Systems solutions described here.

EFI's extensive offerings in this space are each profiled individually.

PrintSmith Site

PrintSmith Site is the customer-facing web job submission application that works in conjunction with EFI's PrintSmith print MIS system for the on-demand, business, and quick printing markets. PrintSmith Site incorporates an e-catalog for easy reprinting of on-demand jobs. Purchase of PrintSmith at an approximate cost of \$5,000 is a prerequisite to utilizing PrintSmith Site. The system supports first time job submission, a simple variable data print capability for business cards and stationery using EFI's Design Composer/Document Composer application, as well as catalog-based ordering. Job details are automatically downloaded into the PrintSmith management system and e-mail notifications are sent to the buyer.

PrintSmith Site also allows the print service provider to customize a catalog focused on the key types of products and applications the shop offers to customers, such as:

- Business materials, including business cards and stationery
- Professional printing such as resumes, reports, and brochures
- Copy services
- Office supplies

PrintSmith Site also includes messaging with EFI's PrintMessenger desktop print-driver (MacOS X and PC) with PDF generating drivers, and an instant pricing feature.

PrinterSite Family (PrinterSite Internal, PrinterSite Fulfillment, PrinterSite Exchange)

PrinterSite Internal is designed to enhance the productivity of sales, CSR and estimating personnel and

links directly to EFI's Hagen OA, Logic and PSI MIS solutions.

With PrinterSite Internal, sales personnel can easily capture customer requirements using a laptop computer or wireless PDA and transmit information to the plant without the need for rekeying by estimating or CSR staff. Job specifications are entered by the sales representative in consultation with the customer, and the system populates prices which the estimator reviews, making adjustments as necessary. The print service provider can design customized forms to ensure that the data captured is in alignment with existing systems and operations. Companies that have implemented this solution report that estimators can handle a higher volume of work, and the cycle time for generating estimates is dramatically reduced — an important benefit in ensuring a higher close rate on quotes.

PrinterSite Fulfillment began shipping in the June 2004 timeframe, interfaces with Logic and PSI, and will be released for Hagen in February of 2005 with the upcoming Hagen 8.5 release. This module is primarily designed to support and manage finished goods but also supports print on demand items as well. EFI's Design Composer/Document Composer is integrated into the module for template creation and editing as well as versioning, and EFI plans to add database driven variable data capability in a future release as part of its overall web-enabled variable data printing strategy.

The types of print-on-demand products users generally manage with PrinterSite Fulfillment include items like business cards, stationery and reprinting of brochures. PrinterSite

Fulfillment and the MIS system work together in the delivery of different functionality to customers and production, appearing as an end-to-end integrated solution. MIS is responsible for inventory, billing, tax and shipping calculations, and generation of job tickets that go into production. The website handles all of the interaction with the print buyer and end-user, delegating much of the functionality to the end-user desktop, with the print buyer administering the overall relationship from the customer side. Within PrinterSite Fulfillment, users can create catalog items, and it operates just like any Internet storefront catalog shopping cart experience. The site is branded with the printer's name and logo, as well as the end customer's name and logo. When an order is placed through PrinterSite Fulfillment, data is transferred to the MIS system, eliminating the need for the rekeying required when orders are placed by phone or fax. PrinterSite Exchange is the commercial print version of Digital StoreFront, operated by EFI as a hosted solution, and with planned integration into the Hagen, Logic and PSI Print MIS systems to be delivered in 2005. PrinterSite Exchange is primarily a first-time job submission tool. It is attractive to printers who are adding digital to their portfolio and find PrinterSite Internal too complex to use for shorter-run, quick turn digital print-on-demand jobs, desiring to offer self-service to their customers. The customer simply fills out a relatively simple job ticket and submits the job, and is presented with an online quote based on the job characteristics. The customer can submit a job, fill out a job ticket, see the price, buy the job, and have it produced with just a few mouse clicks. While PrinterSite

Exchange does have a catalog, the catalog does not support finished goods — it is oriented toward re-ordering of jobs that have been submitted previously. It does, however, support full-featured variable data templates, real time proofing and reprinting of existing jobs. PrinterSite Exchange comes standard with EFI's PrintMessenger print driver which can be distributed to unlimited clients, allowing the print service provider to include settings that ensure that the correct PDF files are delivered directly into the printer's workflow.

EFI Digital StoreFront

EFI Digital StoreFront is the licensed software version of PrinterSite Exchange, and is also offered in an entry-level version as Digital StoreFront Express. Express has no e-commerce capability, although that can be added once users upgrade to the full Digital StoreFront offering. Digital StoreFront Express also supports only one output option — one Fiery, one MicroPress or one Balance. By upgrading to the full Digital StoreFront version, printers can drive unlimited multiple output devices. Like PrinterSite Exchange, Digital StoreFront supports e-commerce, variable data printing, a catalog, credit card payment, a shopping cart and a pricing engine.

Digital StoreFront 2.0 is based on an all-new platform and architecture which incorporates technologies from across EFI.

Printchannel

Printchannel was acquired by Printcafe prior to Printcafe's subsequent acquisition by EFI. EFI continues to see the value of supporting Printchannel's loyal customer base, dedicating a team to continued devel-

opment of the Printchannel application. Its 2004 release featured a number of enhancements, including a shopping cart and the ability to more easily brand the user interface, including colors, custom buttons and logo placements. In these development efforts, a key strategy for EFI has been a focus on ensuring that enhancements are portable to its other applications in order to better leverage its development efforts and the ability to migrate functionality across its product suite.

Printchannel counts more than 110 printers among its customer base, with thousands of users and a transaction volume of some 30 to 50 thousand orders per month. Printchannel customers are primarily producing business cards, stationery, and some direct mail including postcards.

EFI Printellect

Finally, EFI offers an enterprise print procurement management solution, Printellect, formerly EnterpriseSite. This solution is designed for large corporations who wish to manage print procurement and work with multiple print vendors from a single interface. Printellect allows users to specify complex print projects and transmit specifications to one or more printers for quotes, award project, and manage through the production process.

With Printellect, online project tracking allows users to instantly check job status 24 hours a day, 7 days a week. Project display filtering lets buyers and managers customize their own workspace to view projects the way they want. Automated e-mail, file transfer, online project notes and other powerful web features give buyers a variety of ways to work

with printers more accurately and efficiently.

EFI indicates that there are about 20 enterprise customers currently using Printellect. Each Printellect sale is quoted separately, since requirements vary widely from customer to customer; EFI declined to disclose any specific pricing for this offering. However, the company did indicate that in marketing Printellect, it is maintaining its printer agnostic stance by not supplying sourcing consulting services, databases of printers or other enterprise-specific corollary offerings. Printellect is positioned as a solution that can make the process easier for all constituents involved in print procurement activities.

NowDocs

NowDocs emerged during the dot-com boom as a print e-procurement and print-on-demand provider. Taylor Corporation, a large, privately-held conglomerate headquartered in Mankato Minnesota, acquired NowDocs' technology. In October 2002, NowDocs, Int. (International) was launched as a newly formed entity under the Taylor Corporation family of companies.

Over the past two years, NowDocs completely rebuilt its offerings on the Microsoft .NET platform, and offers NowPRINT as both server-based and ASP print e-procurement solutions.

NowDocs also acquired RxLASER, Inc. a provider of electronic document distribution solutions. RxLASER develops and markets software and document distribution solutions for managing business information input and output. RxLASER's suite of electronic form, intelligent laser check and output management systems provide

document output and delivery capabilities for organizations of all size.

Press-Sense

Headquartered in Israel, Press-Sense's key offering in the commercial print space, iWay Prime, is a machine and workflow independent solution marketed to commercial printers, quick printers, in-plant printers and facilities management operators to manage both offset and digital printing with customized workflows; it incorporates PDF preflight as well. Companies can usually be up and running within a few days to two weeks of install.

Press-Sense recently launched MiWay, an add-on module that allows printers greater flexibility in customizing their iWay Prime instance. The company expects to release iWay Set in early 2005, which will expand the scope of iWay Prime by enabling full management of the ordering and production cycles for jobs with multiple components such as color pages, black & white inserts, and tabs. Press-Sense is also launching the iWay Manager early next year, which will increase the number of MIS features included in the product, and enable support for full operational cycles for every job type, not only POD.

Press-Sense has approximately 250 to 300 installs in print provider sites, with each of them having one or more print buyers working in the system. End-user companies include such well-known names as Nokia and Siemens. In terms of geographic distribution, 50% of Press-Sense installs are in Europe, 40% in North America, and the company is beginning to gain traction in Asia. The application is fully multilingual and

supports double-byte fonts required to support languages such as Chinese and Japanese.

Printable

Printable Technologies primarily markets its products to small- and medium-sized commercial printing companies with more than 10 employees, although the company has increasing presence in larger printing establishments and some enterprise print procurement management instances. As an example of implementation by larger printers, Cenvoe (formerly Mail-Well) enabled ten of its sites with Printable in the month of November 2004.

Printable has four types of offerings, all of which are JDF compliant. Services enabled via Printable include File Transfer; Preflighting; color-accurate Online Proofing; Dynamic/Variable Data ordering; front and back-end System Integration including integration with e-procurement and other solutions like Ariba, SAP, and digital asset management; and other Site Management Tools.

Printable's mainstay continues to be its hosted ASP offering, which represents 99% of its customer base. This is a low cost of entry product with a robust feature set. Printers can manage an unlimited number of customers using this hosted solution. In addition to this core offering, Printable has added:

1. Data Center Server Edition. Some customers prefer to operate with a dedicated server, with the application and all back-ups managed by Printable in its professionally managed server farm.
2. On-Site Server Edition. In this implementation, the printer or

advertising firm prefers to maintain the physical server behind their firewall, often due to the high volume of large images they are processing.

3. Enterprise Server Edition. Some enterprise clients prefer to have the server behind their firewall, for example, if their IT operation has rigid standards of operation that do not favor the hosted ASP model.

Printable operates solely on a subscription basis with no transaction fees. The company positions its one-time implementation fee as all-inclusive of the application as well as the training, sales and technical support required to get the printer up and running. It also includes one completed end customer site and assistance with program launch. Training is generally offered at Printable University and rarely on-site at the printer's operation.

Printable also offers customers the opportunity to either create additional customer sites using Printable Manager, an easy-to-use tool set, or to contract with Printable on a fee basis for those services.

The company claims 100% year-over-year revenue growth over the last three years.

PrintVision **(formerly Servador)**

In the process of transitioning from Servador to PrintVision, the company did more than simply change its name — it also changed the structure of the company to allow more employee ownership, position the company better to attract future investment, and better balance its offerings between consulting, print technology and development.

Today, PrintVision is a unified print procurement platform which houses its suite of product technology solutions in one integrated location.

PrintVision Procure, formerly Servador's reverse auction capability, has been repositioned by PrintVision as a tool to identify enterprise print spend and manage and streamline the procurement process.

Managed Services is a consulting practice with print domain expertise that accesses all of PrintVision's technology offerings as it works with clients to help them better manage print spend. PrintVision reports that clients are achieving 25% to 30% savings in hard-dollar print spend.

Paper is a tool used to contract for directed paper buys using a consortium of PrintVision clients to take advantage of economy of scale instead of a single client going out with a directed paper buy, often resulting in savings of as much as 15% to 25%.

Catalog allows clients to identify how many of a given item are required across the enterprise, aggregate them and issue a contract for production. Finished goods are warehoused and listed in Catalog so that users can order them. Catalog also supports templated customization and print on demand of materials for use by agents, remote sales personnel and franchisees.

WebPrint is PrintVision's web-based submission product for on demand printing. The company indicates is in the process of merging WebPrint into the Procure platform as PrintVision 6.0, which will feature real-time pricing even for complex commercial print,

enhanced proofing and an improved user interface that does an even better job of allowing users to see a WYSIWYG representation of the job as it is being constructed. With PrintVision 6.0, the company hopes to merge the worlds of on demand and commercial print in one interface.

While the company declined to identify specific clients, it indicates that it manages hundreds of millions of dollars of annual spend with 12 clients using virtually the full range of services, and another 12 or so using the solution for spot buying and for streamlining the supply chain.

Prismatek

Launched by industry veterans Dick Mallard and Butch Porcaro, PrintTHAT! is an easy-to-use WYSIWYG print driver that converts native files to PDF from within the native application to deliver files that are guaranteed to print accurately. The application is primarily operated as a hosted application, but the company has installed some server editions to better meet customer requirements.

One key differentiator claimed by Prismatek is the expertise it has to customize the PDF print driver that is core to the product, including workflow and output device considerations, to deliver a PDF file that is tuned to the specific customer's needs.

An Enfocus Pre-flight option is available on both Subscription and Enterprise servers. This option allows a printer to create custom preflight profiles and integrate them into the end-user's print driver, facilitating PDF preflight on the desktop prior to file upload.

Rochester Software Associates

Since 1986 Rochester Software Associates (RSA) has delivered software solutions for digital document production, viewing and management. One of the more recent additions to its product portfolio is WebCRD which is designed to get print jobs into production from a variety of sources and then enable production to track orders, drive them to printers, and manage production.

SurePDF is essentially an Adobe Acrobat PDF distiller for unlimited desktops which allows the production center to control PDF conversion settings. The company also offers a server-based PDF conversion called CentralPDF for customers who prefer to centralize PDF production rather than allow it to occur at the desktop. WebCRD can also be configured with table-driven pricing that can return a real-time price to the requester.

A key differentiator for WebCRD is its ability to directly drive production printers from all of the manufacturers; the company is also adding CTP drivers for the offset environment.

WebCRD also offers template-based variable data capability for business cards, stationery and other PDF forms with variable data fields. WebCRD also has a file storage component and catalog function, with both private and shared archives that provide authorized access to shared content.

To streamline the ingestion of hard-copy work into the production system, RSA has introduced QDirect, and QDirect.edu for the education market. Users simply scan documents on an MFP, specify job characteristics and submit the job to the centralized print center, immediately receiving a confir-

mation printed on the MFP that the job was received, including expected delivery date.

WebCRD comes with a customer roll-out kit designed to help customers launch their new service and gain user adoption. It is a full implementation plan from installation, through launch and other marketing initiatives, including guidance on setting up a pilot, how to select pilot users and how to hold an effective open house to market the new services.

Sequiam Software

Sequiam Software is a subsidiary of biometrics company Sequiam, Inc. Its print driver application has been on the market since approximately 2003 and was formerly known as Internet Remote Printing. Headquartered in Orlando, FL, most of the company's customers are in Florida and include Florida State University, Seminole School District and Volusia County School District. The company also has installs at universities in Georgia, Mississippi and Louisiana as well as a partnership with AlphaGraphics. The application is integrated with Blackboard for student printing applications so that print jobs can be directly charged to student debit cards.

Print It, 123! is an easy-to-use print driver that works from within native applications in a File/Print mode and creates a PostScript file that is compressed and transmitted to the print center. Scan It, 123! allows users to submit hardcopy jobs from any Twain or ISIS compliant scanner. And Manage It, 123! is a file storage and management solution that offers both shared and private storage for easy management and reprinting of documents. The three solutions are bundled as Smart Access Suite

Prior to launching her consulting practice, **Ms. Cary Sherburne**



was the Vice President of Marketing Communications and Outsourcing Solutions at IKON Office Solutions. In that capacity, she developed and implemented a branding campaign to build brand awareness for IKON in the marketplace as well as enhance employee pride in the organization, and was responsible for all internal and external communications, including trade shows and events, corporate newsletters, and industry and press relations. In the outsourcing role, she set strategic objectives and priorities for IKON's product and services portfolio in its Outsourcing businesses, including development of programs and sales support materials for that environment.

Sherburne was a Director at CAP Ventures, an internationally known firm specializing in market research and strategic consulting for the digital document and print on demand industry, before joining IKON, where she launched and managed the company's Document Outsourcing Consulting Service.

Her tenure in the printing and publishing industry has also included sales and marketing positions at Xerox Corporation, Indigo America and Bitstream. She is a frequent speaker at industry events and a recognized author.

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