

Market Study: Multi-Channel Solutions for Customer Communications Management

A Madison Advisors Report

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EXECUTIVE SUMMARY

Madison Advisors' examination of the customer communications management (CCM) market in this transitional time of emerging multi-channel contact reveals that traditional document composition vendors lead the market in support for the full range of customer communications. Most of the vendors appear well prepared to support demands for composing electronic communications with the same level of corporate control and regulatory compliance available to printed communications. Key findings from the study include:

VENDOR PARTICIPANTS

AIA, ITP Document Platform 4.1
EMC Document Sciences, xPression Enterprise Edition v4
FIS, CSF Designer 10.0
GMC, PrintNet 7
HP Exstream, HP Exstream 8.0
Inventive Designers, Scriptura 6.3
ISIS, Papyrus Platform v7
Napersoft, Document Platform CCM 6.0.2
Pitney Bowes Business Insight, EngageOne Platform
Sefas Innovation, Open Print MiddleOffice 6.2
StreamServe, Persuasion V 5

- **Demand for multi-channel communications is growing, yet companies lack an effective Customer Communications Management (CCM) strategy** – A majority of large organizations have developed plans to reduce print production and developed strategies to communicate with customers via electronic channels; however, many of these same organizations rely on different systems to create and manage printed and electronic communications.
- **Document composition is frequently a service delivered to users of business applications** – Most commonly by using Web Services, organizations embed document composition functionality within existing office systems to manage interactive and on-demand document creation.
- **Sales increased in late 2009** – Seventy percent of the vendors reported an increase in sales of new systems in 2009 over 2008.

This Madison Advisors' study covers both the supply and demand sides of the CCM market. While conducting consulting engagements with users of software solutions since our inception in 2001, we have gained first-hand knowledge about the CCM applications and requirements of many and varied organizations. Since the beginning of 2010, our research activity has been focused on assessing the latest trends and drivers for multi-channel customer communications with both vendors and end-users.

This report presents the results of our extensive and continuing study on the CCM market. We review the key market drivers, compare the solutions, offer insight into the best practices of organizations that are leading the industry with multi-channel customer communications, and, finally, provide an overview of each solution we assessed.

SECTION I – MULTI-CHANNEL SOLUTIONS MARKET OVERVIEW

The customer communications management market extends from initial communications strategies and planning through document creation and delivery to response management. It covers collection and sorting of customer data from various sources, such as business transactions and demographic information. CCM incorporates the management and delivery of personalized content through one or more channels.

Multi-channel solutions represent the largest segment of the CCM market. These solutions compose personalized documents by assembling content and data elements according to business rules defined in document templates. Designers create business rules to control the presentation of personalized data, such as purchases, account activity, or demographic information. Multi-Channel composition engines merge all the data and content to produce individual documents for print output or electronic delivery. Documents produced by document composition tools include statements, bills, letters, notices, and insurance policies.

Within the multi-channel solutions market study, we discuss the business processes used to create customer communications, the channels used to deliver these documents, and the adoption of these by both the corporate and consumer segments of the market.

DOCUMENT PROCESSES

Organizations use document composition solutions to generate customer communications through one or more types of processes based on how the composition engine receives data. The composition engine composes documents as it receives variable-data records, using business rules and conditional logic to assemble the templates, content, and data into a unique document. The engine receives data through one or more business processes. In this subsection, we discuss the most common processes, listed below:

- Batch Processing
- Interactive Processing
- On-demand Processing

The figure on the following page displays the interaction of data, composition, and output for the three composition processes.

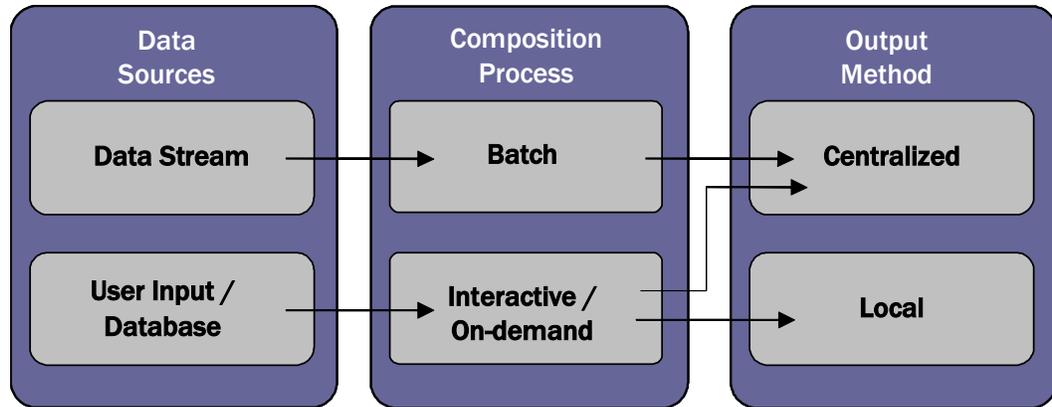


Figure 1: Document Composition Processes

BATCH PROCESSING

With batch processing, document composition systems receive multiple records for generating multiple documents in a single batch from back-office business applications, such as ERP systems, customer information systems, and policy administration systems. The business application responsible for managing the transaction between the corporation and consumer extracts the transactional data at fixed intervals to trigger the composition of a set of documents. The document composition system applies the data to the template and assembles any additional data or content required to complete the document. Typical batch applications include monthly bank statements, insurance policies, and telephone bills.

INTERACTIVE PROCESSING

For interactive processing, document composition systems receive data directly from a user interface. As the data is entered, the composition system assembles the required document components and queries the user for additional data. The document templates used during the process vary based on the data entered. For example, a customer service representative (CSR) collects data from a customer over the phone, and new forms and pages are added to the document as the data is collected. The system then prompts the CSR to obtain the data required by the new forms.

Interactive processing often requires the ability to save any work in process because the individual starting the document may not have all of the information necessary to complete it. Systems that support interactive processing allow the user to save a partially completed document in a queue for further processing by the same individual. Alternatively, the system may forward the document to another party for additional processing. The document is not released to production until it is complete.

ON-DEMAND PROCESSING

On-demand processing allows organizations to generate individual documents based on the receipt of a single data record. This type of processing requires the ability to engage the composition engine on an ad hoc basis, preferably through a Web Service or messaging interface.

Self-service applications utilize on-demand processing. For example, with a self-service application, a customer requests product or quote information online and a back-end system immediately presents a personalized document containing the requested information. The user then prints the document locally, if desired. Alternatively, the requests are stored and processed in batch to create printed output.

The service or messaging system connecting the composition tools to the web application ensures that all of the required data elements are present and that the composition engine contains all of the business rules necessary to produce the document based on the data received.

MULTI-CHANNEL COMMUNICATIONS

Organizations generate multi-channel communications using any of the three document processes. Multi-Channel communications include printed materials, online presentment, personalized URLs, e-mail, and text messages. Corporate applications such as ERP, CRM, or campaign management systems generate customer communications and output documents directly or through a document composition solution.

When organizations deliver statements and similar transactional documents through online presentment, customers log in to the organization's website and view current or archived documents in either HTML or PDF. For current documents, the web interface calls upon a document composition system to retrieve the most recent data from a host system and generate the documents on-demand. Archived documents may be duplicates of printed documents or may be part of an initiative to suppress printing by using online presentment only.

Personalized URLs contain content designed specifically to meet a consumer's interests, such as product literature or special offers. Consumers receive the unique website address for their content via printed or electronic communications. The web server hosting the personalized sites tracks which sites have been accessed and triggers a response, such as generating printed product brochures or updating a CRM or campaign management database.

Organizations also deliver transactional - and marketing - documents via e-mail. Although more timely than printed documents, e-mail communications are dependent on customers providing current e-mail addresses and are vulnerable to delivery obstruction from multiple spam and security filters. E-mail communications provide an opportunity for an organization to include a link to a secure website, a personalized URL or to attach documents, such as product brochures, forms, and notices.

For the timeliest communications, organizations use text or SMS messages to communicate account status, suspicious account activity, last-minute sales or other time-sensitive notices to customers. Customers receive text messages via mobile phone or through web applications, such as Twitter and Facebook.

Successful multi-channel communications require more than just sending e-mail or text messages to customers, it requires organizations to combine customer-specific data and the unique abilities of the channel to connect with customers. For example, by embedding personalized web page links in e-mails, organizations direct customers to specific offers based on previous purchases. Many organizations already create electronic communications such as e-mail, but they do so using bulk mail applications separate from the document composition solutions. Without integration between a CRM or campaign management system and a document composition solution, the organization cannot effectively implement a multi-channel customer communications strategy.

CORPORATE ADOPTION

While business-to-business electronic transactions have become widely accepted due to the established EDI (Electronic Data Interchange) standard and the use of computerized transaction records, the adoption of electronic customer communications has lagged behind. Consumers accept electronic communications for specific applications, such as electronic presentment, online bill pay and travel reservations, but general acceptance of electronic business communications has been slow.

Through primary research on multi-channel communications trends, Madison Advisors found that nearly every organization factors print reduction and electronic delivery into its technology acquisition planning. In addition, document composition vendors report that customers more often include requirements for multi-channel delivery in RFPs and discuss strategies for print suppression during vendor site visits.

A Madison Advisors survey of insurance companies found that every company incorporates print suppression goals into their resource allocation and vendor

selection processes. Like banks and other regulated organizations, insurance companies seek to reduce costs, while still maintaining compliance.

Is Print Suppression playing a role in the future direction of your customer communications strategy?

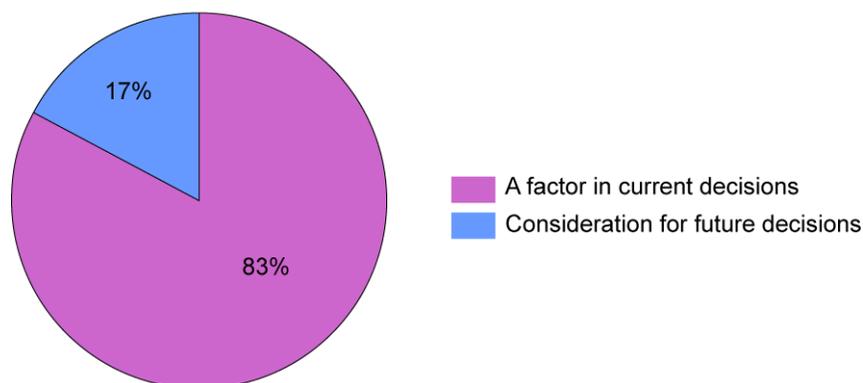


Figure 2: Madison Advisors' Survey Results on Impact of Print Suppression on Decision-Making

As shown in Figure 2 above, more than two-thirds of the companies surveyed incorporate print suppression as a factor in their customer communications strategy, which includes decisions on acquiring document generation technology. For example, these companies include requirements for e-delivery in requests for proposals.

Organizations most often cite cost reduction as the leading driver for e-delivery. Postage represents the largest percentage of the cost to produce and deliver printed communications. Multi-channel communications offer organizations an opportunity to reduce print while still engaging with customers. Collecting customers e-mail addresses, phone numbers, and other contact points also allow organizations to strengthen their relationship with their customers. Using text messages, organizations communicate new or time-sensitive types of information, such as when bank accounts reach pre-defined limits and other notices that would take several days to arrive by mail.

Other benefits of electronic communications include support for green business practices and improved customer experience for the growing number of customers who prefer e-mail and text messages to printed communications.

While there are benefits to implementing multi-channel communications, organizations also face challenges in doing so. First and foremost, many customers would rather not share more personal data, such as e-mail addresses with businesses and even customers that do, often forget to update the business when an e-mail

address changes. Unfortunately, there is no registry for email addresses like the National Change of Address database maintained by the USPS for print mail.

Regulated organizations also face a challenge maintaining compliance with state and federal statutes when using electronic communications. Page fidelity and proper placement of items, including graphics and images, can be challenging with a standard e-mail message. Document composition systems address this by formatting the e-mail using the same business rules as a printed document.

There are also inbound communication issues to consider. Some organizations need to maintain a record of every incoming customer contact and use ERP or CRM systems to do so. Since customers initiate these activities, organizations have trouble predicting when to respond. For example, organizations that mail monthly statements may expect increased call volumes after the first of the next month, but do not know which customers will call with questions or to request additional information. Organizations without a multi-channel strategy or that lack integration between systems, face the prospect of sending, receiving, and storing inbound and outbound messages across multiple systems. Multi-channel solutions need to provide integration to corporate ERP, CRM, and campaign management systems. Ideally these solutions can be integrated with imaging and workflow systems or provide these functions internally.

CONSUMER ADOPTION

Presenting documents online and sending bulk e-mails is not enough to drive consumer adoption. To move consumers from paper to e-delivery, organizations need to take advantage of the benefits of electronic communications and highlight these benefits to consumers.

Both e-mail and text messaging provide organizations with a faster delivery channel. These channels can be used to notify customers of changes to their accounts, suspicious account activity, or special offers. Banks and other financial institutions advertise account alerts delivered via text message to a consumer's cell phone. Other options include order status updates or service specials. On-demand communications, which are created at the request of the customer, often result in a document being presented online, but may also trigger additional documents to be printed or e-mailed, as in the case of a loan application.

Electronic communications enable faster customer responses to requests for additional information or offers. Organizations can embed links into e-mails that direct customers to a personalized web page or a secure website. These links allow customers to immediately follow-up and fill out online forms or request product literature. In both cases, a document composition system capable of generating

online forms or producing documentation on-demand would fulfill the customer request.

Organizations find that leveraging all available channels to provide the preferred or the most appropriate communication type to each customer and for each situation results in the highest customer satisfaction. A multi-channel document strategy requires an organization to deliver complementary communications across multiple channels and receive communications from customers through multiple channels. Using response rates and consumer preference data from a campaign management (CM) system, organizations identify the best channel for each customer and each type of communication. The reporting tools embedded in CM solutions offer organizations the ability to track consumer adoption and develop marketing strategies through the use of multi-channel solutions.

SECTION II – MULTI-CHANNEL SOLUTION ANALYSIS

When comparing solutions, organizations need to consider many factors in addition to product functionality. The solution must support the organization's CCM strategy in terms of its goals and strategic direction. In addition, the solution should be in line with an IT strategy regarding platform support, architecture, and modularity. Some organizations prefer bundled solutions with functional modules covering the entire communications cycle, while others prefer to acquire best-of-breed point solutions and integrate components. Regardless, organizations must consider multiple aspects of a multi-channel solution.

Madison Advisors positions multi-channel planning and data management upstream from the core document composition capabilities. CCM strategies and planning determine which channels an organization chooses to use for customer communications. Data management consolidates information from various sources to provide organizations with a single 360-degree view of the customer. Content management, delivery, and response management functions occur after the design and creation of the document.

The table on the following page compares each solution based on its capabilities. While the vendors offer packaged integration to third-party products in some areas, other functional areas require custom integration using programming interfaces. This level of integration ranges from simple to complex depending on client requirements, so Madison Advisors does not consider functionality achieved through programming interfaces in its evaluation. More detail about each vendor's product capabilities is provided in the vendor profile section (Section III) of this report.

PRODUCT	CAMPAIGN STRATEGY & PLANNING	DATA MANAGEMENT	COMMUNICATION DESIGN AND CREATION	CONTENT MANAGEMENT & PORTALS	PRODUCTION & DELIVERY	RESPONSE MANAGEMENT
ITP Document Platform	○	●	●	○	○	○
xPression	○	○	●	●	○	○
CSF Designer	●	●	●	●	○	○
PrintNet	●	●	●	●	●	○
HP Exstream	●	○	●	●	●	●
Scriptura	○	○	●	○	●	○
ISIS Papyrus	●	●	●	●	●	●
CCM	●	○	●	○	○	○
EngageOne	●	●	●	○	●	●
Open Print MiddleOffice	○	●	●	○	●	○
Persuasion	○	●	●	○	○	○

Table 1: Multi-Channel Solution Capabilities

Key: ● High-level Capabilities; ○ Some Capabilities; ○ Limited Capabilities

Most solutions provide programming interfaces for integration with CRM or campaign management software, while others, such as **CSF Designer** offer packaged integration. **ISIS Papyrus** offers its own CRM functionality as well as integration with other CRM solutions.

While all the solutions accept various data formats as inputs into the document composition process, Madison Advisors found that vendors have embedded extract-transform-load tools into the solution to allow customers to manipulate one

Madison Advisors expects advanced functionality, including customer segmentation, data cleansing, and predictive analysis to be incorporated into multi-channel solutions within the next few years.

or more data sources. Madison Advisors expects advanced functionality, including customer segmentation, data cleansing, and predictive analysis to be incorporated into multi-channel solutions within the next few years.

All the solutions support template design and document composition as core functions. Although batch processing remains the most common method of document composition, all the vendors support on-demand and interactive composition processes as well. This represents a significant change from a few years ago, when only a few vendors offered interactive solutions.

Most vendors utilize an internal database to store templates, graphics, and other content elements used during the composition process, but some solutions rely on enterprise content management systems, such as Documentum and Filenet, as their centralized content repository. As a result, several vendors offer packaged integration between their multi-channel solution and one or more content management solutions.

Again, all the multi-channel solutions support a wide range of output formats suitable for different delivery channels. In addition, some vendors, such as **Sefas** provide full output management and item tracking. **PBBI** offers solutions for management and delivery of both printed documents and e-mail.

Response management represents an area of opportunity for most multi-channel solutions. Multi-channel solution vendors offer various levels of reporting, but only a few capture inbound communications, track response rates, and integrate with response management modules within CRM systems. Organizations require response reporting and analysis of the response data to determine if a multi-channel communication has been successful.

SECTION III – VENDOR PROFILES

The following section provides brief profiles of the participating vendors and information on each vendor’s current multi-channel solution. The profiles list specific areas of multi-channel capability, a list of supported operating systems for each product, as well as product support levels provided by the vendors. Madison Advisors recommends contacting the vendors for the most up-to-date product releases.

AIA ITP DOCUMENT PLATFORM 4.1		
Company Overview	Headquarters: Nijmegen, The Netherlands Revenue: Private Employees: Private	
Product Focus	ITP leverages Microsoft Word and OpenOffice.org to create templates for batch, on-demand and interactive document processing with support for multiple languages and brands. ITP/Server provides centralized document composition and post-processing from templates stored in a database repository. ITP offers integration with third party, back-office solutions and an integration framework for connections to Microsoft CRM and Microsoft SharePoint.	
Multi-Channel Support	ITP/Server composes print and electronic output formats. ITP Server’s scriptable engine enables custom integration with any solution. In addition, ITP provides a number of standard interfaces including an SMTP interface to e-mail servers, but lacks packaged integration with campaign management systems.	
Platform Support	Server	Client
	Windows 2000 Windows Server 2003 Windows Server 2008	Windows XP and 7 Internet Explorer 6.0 or higher Mozilla Firefox 3.0 or higher
Support	Aia Software BV provides support for all direct customers. The first line of contact is a dedicated service desk in the Netherlands. Channel-sales customers access first-level support through the partner responsible for the sale of ITP and Aia Software provides second-level support.	
Contact Information	Tim van Hugte PO Box 38025 6503 AA Nijmegen The Netherlands +31 24 371 02 30 t.van.hugte@aia-itp.com http://www.aia-itp.com	

Table 2: AIA ITP Platform 4.1 Profile

EMC DOCUMENT SCIENCES xPRESSION ENTERPRISE EDITION v4		
Company Overview	Headquarters: Carlsbad, California Revenue: \$14 B (FY 2009) Employees: 40,000	
Product Focus	<p>xPression enables users to create data-driven document templates using one of three xPresso clients which are plug-ins for Microsoft Word, Adobe InDesign, and Adobe DreamWeaver. These templates can be managed and versioned in xPression's centralized repository or EMC Documentum, then dynamically rendered for the appropriate channel in batch, on-demand, or interactively. In addition, xPression provides out-of-the-box interactive business applications, xResponse and xRevise, for the creation of correspondence and contracts, respectively.</p> <p>xPression also provides open integration through Web Services, has SAP certification, and offers productized integration with EMC Documentum and IBM FileNet for leveraging enterprise content and workflow, as well as archive integration with EMC Documentum, IBM FileNet, and IBM OnDemand</p>	
Multi-Channel Support	xPression supports all channels from a single template for use in any process, including a single interactive editing session that can be published to all channels. xPression also provides for channel-specific design through the individual xPresso plug-ins. Additionally, xPression sends e-mail via SMTP or can pass an XML file with embedded header and HTML messages to a bulk e-mail server for multi-part e-mails	
Platform Support	Server	Client
	Windows Server 2003, 2008 Sun Solaris 10 IBM AIX 6.1 RedHat Linux 5.3, 5.4 SUSE Linux 11	Windows XP SP3 Windows Vista Windows 7 Mac OS X 10.4.11. 10.6.2
Support	EMC Document Sciences provides first level support for all products in the xPression Suite.	
Contact Information	Dane Becker EMC Document Sciences 5958 Priestly Drive Carlsbad, CA 92008 (760) 602.1400 dane.becker@emc.com www.emc.com	

Table 3: EMC Document Sciences xPression Enterprise Edition v4 Profile

FIS CSF DESIGNER 10.0	
Company Overview	Headquarters: Jacksonville, Florida Revenue: \$5 B (2009) Employees: 30,000
Product Focus	CSF Designer enables users to create a wide range of applications with data mapping, integrated message content, and transactional tables. The product also allows users to create PDF forms to be used as data collection templates. The composition engine allows the same templates to be utilized for batch, interactive, and on-demand application environments.
Multi-Channel Support	CSF composes print and electronic output formats, including HTML and XAML. CSF delivers content via e-mail using SMTP or POP3 e-mail server integration. FIS has partnered with a third-party to deliver encrypted PDF content via e-mail. CSF offers packaged integration with Connections, an FIS CRM system deployed at over 150 banks.
Platform Support	Server
	Client
	z/OS z/Linux Sun Solaris IBM AIX HP-UX Linux Windows
	Windows Internet Explorer v6.0
Support	FIS provides its own product support (24 x 365). For any third party products supplied by FIS, level 1 and 2 support is provided by FIS with development support provided by its technology partners. International customers may be supported directly by FIS or through a certified partner.
Contact Information	Cory Olson W126 N7449 Flint Drive Menomonee Falls, WI 53051 (414) 815-4549 Cory.olson@fisglobal.com www.fisglobal.com

Table 4: FIS CSF Designer 10.0 Profile

GMC PRINTNET 7		
Company Overview	Headquarters: Appenzell, Switzerland Revenue: Private Employees: Private	
Product Focus	GMC PrintNet Designer enables users to create a wide range of applications. The product imports PDF files as an editable layout source for document design. The composition engine allows the same templates to be utilized for batch, interactive, and on-demand application environments. PrintNet Interactive allows Web-based users to create and edit documents and marketing messages based on templates created in PrintNet Designer.	
Multi-Channel Support	PrintNet Designer integrates with MindFire to create personalized URLs and landing pages and also creates print output with configurable web and e-mail output versions.	
Platform Support	Server	Client
	SUSE Linux RedHat Linux Solaris IBM AIX Windows	Windows Internet Explorer
Support	GMC provides direct support to the majority of clients with a world-wide support staff. Xerox and Océ provide some 1st level support to selected clients. First line of GMC contact is via the local country office.	
Contact Information	Bill Parker Hirschengasse 12 9050 Appenzell Switzerland b.parker@gmc.net www.gmc.net	

Table 5: GMC PrintNet 7 Profile

HP EXSTREAM 8.0		
Company Overview	Headquarters: Palo Alto, California Revenue: \$114.6 B (2009) Employees: 304,000	
Product Focus	HP Exstream enables users to create a wide range of applications and assign objects to one or more output channels. During processing, the composition engine generates printed and electronic outputs with only the objects assigned to the given channel. HP Exstream supports batch, on-demand, and interactive processes. HP Exstream offers out of the box integration with IBM Content Manager, Day Software, and HP TRIM, as well as SAP's ERP system.	
Multi-Channel Support	HP Exstream delivers content to virtually any print or electronic delivery channel including XML, HTML, SMS, RSS, and social media sites. It connects to Microsoft Outlook, HP Output Server, and its own module for e-mail delivery. The engine applies the appropriate attributes to various content elements for each channel.	
Platform Support	Server	Client
	Windows Server 2003 Windows Server 2008 z/OS UNIX (HP-UX, IBM AIX, Sun Solaris) Linux (SuSE, Red Hat) AS/400	Windows XP Windows Vista Windows 7
Support	HP Exstream's support group provides all levels of support, including first contact. HP's Technical Support Center is available via phone, email, or online system.	
Contact Information	Harold Jackson 810 Bull Lea Run Lexington, KY 40511 (859) 296.0600 hjackson@hp.com www.hpexstream.com	

Table 6: HP Exstream 8.0 Profile

INVENTIVE DESIGNERS SCRIPTURA 6.3					
Company Overview	Headquarters: Antwerp, Belgium Revenue: €4.2 M (2009) Employees: 31				
Product Focus	Scriptura enables organizations to graphically design documents and e-forms. The product supports batch, on-demand, and interactive processes. Scriptura implements the concept of an automated document factory (ADF) to control the entire document flow from data collection and composition to output production, delivery and reporting. Based on open standards, Scriptura is platform independent.				
Multi-Channel Support	Scriptura uses the SMTP protocol to communicate with mail servers.				
Platform Support	<table border="1"> <thead> <tr> <th>Server</th> <th>Client</th> </tr> </thead> <tbody> <tr> <td>Windows (2003, XP, Vista, 2008, 7) Mac OS/X z/OS MVS (USS and Linux) Unix (HP-UX, IBM AIX, Sun Solaris) Linux OS/390 OS/400</td> <td>Windows XP Windows Vista Windows 7</td> </tr> </tbody> </table>	Server	Client	Windows (2003, XP, Vista, 2008, 7) Mac OS/X z/OS MVS (USS and Linux) Unix (HP-UX, IBM AIX, Sun Solaris) Linux OS/390 OS/400	Windows XP Windows Vista Windows 7
	Server	Client			
Windows (2003, XP, Vista, 2008, 7) Mac OS/X z/OS MVS (USS and Linux) Unix (HP-UX, IBM AIX, Sun Solaris) Linux OS/390 OS/400	Windows XP Windows Vista Windows 7				
Support	Inventive Designers provides first line support for all direct customers. Channel support depends on the specific SLA between the partner and Inventive Designers. In most cases the partner is required to have trained staff that handles first line support.				
Contact Information	Joke Dehond Sint-Bernardsesteenweg 552 B-2660 Hoboken Belgium +32 (3) 821 01 80 joke_dehond@inventivedesigners.com www.inventivedesigners.com				

Table 7: Inventive Designers Scriptura 6.3 Profile

ISIS PAPYRUS PLATFORM V7	
Company Overview	Headquarters: Maria Enzersdorf, Austria Revenue: €60 M (2009) Employees: 310
Product Focus	ISIS Papyrus enables organizations to develop document templates and create adaptive workflow models for repetitive and ad-hoc processes. The product supports the processing of inbound communications to trigger additional steps in the workflow model. ISIS Papyrus includes specific interfaces for SAP, Siebel, MS-CRM, SOA interfaces to many SaaS applications such as Salesforce, Google Docs, LinkedIn, full support for the Oasis CMIS archive interface.
Multi-Channel Support	ISIS Papyrus allows designers to link content objects to output channels and provides its own POP3 and SMTP e-mail server, as well as end-user client front-end with email archiving, classification, data extraction, automated email attachment handling, and e-mail generation. The composition engine supports print and electronic output formats.
Platform Support	Server
	Client
	z/OS z/Linux Unix (AIX, HP-UX, Sun Sparc, Solaris) Windows Intel Linux Mac OSX
Support	Papyrus Support Centers provide support for all customers. Papyrus offers also Project Quality Assurance support with inhouse consultants, who support the handover from installation to the customer staff and application changes.
Contact Information	ISIS Marketing Service GmbH Alter Wienerweg 12 A-2344 Maria Enzersdorf +43-2236-27551 info@isis-papyrus.com www.isis-papyrus.com

Table 8: ISIS Papyrus Platform V7 Profile

NAPERSOFT DOCUMENT PLATFORM CCM 6.0.2									
Company Overview	Headquarters: Naperville, IL Revenue: Private Employees: Private								
Product Focus	<p>Napersoft CCM utilizes Microsoft Word to create templates for batch, interactive, and on-demand document processing with support for multiple languages. CCM provides centralized document composition and post-processing from templates stored in a database repository.</p> <p>Napersoft CCM integrates to all CRM or ERP systems inbound via a JAVA API, http post or web service call. Napersoft CCM integrates with CRM or ERP systems outbound via the Napersoft CCM plug-in (adaptors) technology.</p>								
Multi-Channel Support	CCM generates and distributes print and electronic output formats. CCM integrates with e-mail products through SMTP and has a partnership with DocuSign for digital signatures.								
Platform Support	<table border="1"> <thead> <tr> <th>Server</th> <th>Client</th> </tr> </thead> <tbody> <tr> <td>MS Windows Server</td> <td>MS IE Mozilla Firefox</td> </tr> <tr> <td>IBM WebSphere JBoss Application Server Oracle WebLogic</td> <td>MS Word (Authors)</td> </tr> <tr> <td>MS SQL or IBM DB2</td> <td></td> </tr> </tbody> </table>	Server	Client	MS Windows Server	MS IE Mozilla Firefox	IBM WebSphere JBoss Application Server Oracle WebLogic	MS Word (Authors)	MS SQL or IBM DB2	
	Server	Client							
MS Windows Server	MS IE Mozilla Firefox								
IBM WebSphere JBoss Application Server Oracle WebLogic	MS Word (Authors)								
MS SQL or IBM DB2									
Support	Napersoft provides multiple levels of support via phone, fax, email and or web. Napersoft help desk escalation is based upon severity level, call type and support maintenance contract. Additionally, consulting services are available from Napersoft Professional Services.								
Contact Information	Napersoft Inc. 40 Shuman Boulevard Naperville, IL 60563 USA (800) 380-1000 Info@napersoft.com ww.napersoft.com								

Table 9: Napersoft Document Platform CCM 6.0.2 Profile

PITNEY BOWES BUSINESS INSIGHT'S ENGAGEONE					
Company Overview	Headquarters: Stamford, Connecticut Revenue: \$5.6 B (2009) Employees: 35,000				
Product Focus	<p>DOC1 Designer allows users to create document templates usable by both the DOC1 Generate composition engine and the EngageOne platform for batch, on-demand, and interactive document processes. The EngageOne Interactive Correspondent templates allow front-line users to create, modify, and deliver communications. The solution includes e2 Vault for the storage and online presentment of customer communication. Content generated by DOC1 and EngageOne can also be loaded and indexed into a wide range of 3rd party content management solutions for archive purposes.</p> <p>In addition, PBBI's acquisition of Portrait Software will allow its DOC1 suite to support advanced customer analytics and campaign management.</p>				
Multi-Channel Support	PBBI DOC1 supports multiple channels including print, while PBBI's Web self-service e-Billing solution and its e-Messaging solution deliver email and SMS messages. PBBI's integrated e-Messaging manages the delivery and reporting of email/SMS communications with built in digital signature support. e-Messaging auto-indexes, categorizes, and archives inbound messages using content based categorization and content based routing features.				
Platform Support	<table border="1"> <thead> <tr> <th>Server</th> <th>Client</th> </tr> </thead> <tbody> <tr> <td>z/OS, OS/390, and OS/400 Unix (AIX, HP-UX, HP-UXi, Red Hat Linux, Sun Solaris) SUSE Linux on z/OS, Open VMS Windows (XP, Vista, 2000, 2003 and Windows 7)</td> <td>Windows XP Windows 2000 Windows 2003 Windows Vista Windows 7</td> </tr> </tbody> </table>	Server	Client	z/OS, OS/390, and OS/400 Unix (AIX, HP-UX, HP-UXi, Red Hat Linux, Sun Solaris) SUSE Linux on z/OS, Open VMS Windows (XP, Vista, 2000, 2003 and Windows 7)	Windows XP Windows 2000 Windows 2003 Windows Vista Windows 7
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Support	PBBI's technical support organization includes first line and second line analysts. PBBI offers client support globally and is available 24/7. Third level support is provided through the engineering organization.				
Contact Information	Pitney Bowes Business Insight One Global View Troy, NY, 12180 (800) 327-8627 pbbi.sales@pb.com www.pbinsight.com				

Table 10: Pitney Bowes Business Insight's EngageOne Profile

SEFAS INNOVATION OPEN PRINT MIDDLEOFFICE					
Company Overview	Headquarters: Paris, France Revenue: Docapost 410M€ / Sefas 10.4M€ Employees: Docapost 5500 / Sefas 80 Sefas is a Docapost La Post Group subsidiary				
Product Focus	Open Print MiddleOffice provides a Java-based design interface for collaborative document design which accommodates a wide variety of customer communications. Open Print MiddleOffice enables true collaboration by allowing all the document stakeholders to work together by sharing objects and reusing components. Open Print MiddleOffice helps companies manage their digital assets, define document presentation standards, and meet compliance requirements.				
Multi-Channel Support	Open Print MiddleOffice composes print and electronic output formats. The product provides an SMTP interface to e-mail servers, but lacks packaged integration with campaign management systems.				
Platform Support	<table border="1"> <thead> <tr> <th>Server</th> <th>Client</th> </tr> </thead> <tbody> <tr> <td> z/OS MVS MVS USS MVS Linux OS/390 Unix (HP-UX, AIX, Sun Solaris, Linux) </td> <td> Windows XP Windows 2003 </td> </tr> </tbody> </table>	Server	Client	z/OS MVS MVS USS MVS Linux OS/390 Unix (HP-UX, AIX, Sun Solaris, Linux)	Windows XP Windows 2003
	Server	Client			
z/OS MVS MVS USS MVS Linux OS/390 Unix (HP-UX, AIX, Sun Solaris, Linux)	Windows XP Windows 2003				
Support	Sefas regional offices in Burlington, MA and Bristol, England provide first-level support with tools to replicate the customer environment in minutes for support or for Q/A purposes. Second and third-level support is provided from its headquarters in Paris.				
Contact Information	Michael Lambert 20 Mall Road Suite 210 Burlington, MA 01803 USA (860) 668.0490 mlambert@sefas.com www.sefas.com				

Table 11: Sefas Innovation Open Print MiddleOffice 6.2 Profile

STREAMSERVE PERSUASION v5	
Company Overview	Headquarters: Burlington, Massachusetts Revenue: \$62.4 M (TTM) Employees: 260
Product Focus	StreamServe Persuasion enables designers to create document templates with multiple columns, variable data, variable images, charts and graphs, complex tables, complex business and presentation logic, and variable business messages for marketing campaigns or promotions. Persuasion offers packaged integration with SAP and Lawson, but integrates with any system sending structured data formats.
Multi-Channel Support	Persuasion composes print and electronic output formats. Persuasion supports SMTP and POP3 interfaces to e-mail servers, but lacks packaged integration with campaign management systems.
Platform Support	Server
	Client
	Windows XP, 2003, 2008, 7 Unix (HP-UX, AIX, Linux, Sun Solaris)
	Windows XP Windows 2003 Windows 2008 Windows 7
Support	StreamServe has a complete support organization with all support levels. The call center staff offers support in multiple languages. Partners may take on 1st and 2nd level support.
Contact Information	Peter J. Gorman 3 Van de Graaff Drive Burlington, MA 01803-5188 (781) 761-6659 peter.gorman@streamserve.com www.streamserve.com Note: Open Text acquired StreamServe in October, 2010

Table 12: StreamServe Persuasion v5 Profile

SECTION IV – CONCLUSION

Madison Advisors' research found that many of the multi-channel solutions offer strong support for creating multi-channel communications. All of the solutions generate print-ready, web-friendly, and text-only formats with variable data elements. Several include data management tools to consolidate transactional data, customer preferences, and demographic data for use in communications. However, most solutions do not manage or track document delivery and do not offer centralized reporting for printed and electronic communications.

When planning an expansion to multi-channel communications, organizations need to consider a multi-channel solution as one part of an overall customer communications management strategy. Additional software, such as e-mail management systems, will be required to manage and report on delivery of the communications to the end-consumer. Integration with marketing and campaign management systems will be required to track responses and tailor any follow-up communications based on end-consumer behavior.

Madison Advisors recommends that organizations set specific goals for multi-channel communications and develop weighted criteria for comparing the various solutions. Successful implementation requires careful planning and a complete understanding of how best to use customer communications to further corporate goals.

STUDY APPENDICES

ABOUT MADISON ADVISORS

Madison Advisors exists to advance the print and electronic communications objectives of Fortune 1000 companies. Madison Advisors specializes in offering context-specific guidance for a range of content delivery strategies, particularly those addressing enterprise output technologies and customer communications.

Madison Advisors offers services and expertise primarily through near-term, high-impact consulting services. With no-nonsense, quick engagements (measurable in days or weeks, not months), Madison Advisors directly helps our clients achieve very hard and specific return on investment (ROI) related to their print and electronic communications initiatives.

Madison Advisors' analysts are dedicated to technology and market research that is delivered through near-term project engagements as well as articles, publications, and presentations. We specialize in customer communication technologies including enterprise output management, content management, customer relationship management, e-billing, and infrastructure technology. For more information about Madison Advisors, visit www.madison-advisors.com.

STUDY CONTRIBUTORS

Contributors to Madison Advisors' Print Suppression Market Study include:

Contributor	Study Focus
Kemal Carr, EDP President & Principal Analyst	Executive sponsor; focus on overall direction of the study and research activities.
Rich Huff Principal Analyst	Lead analyst; focus on technology research, and analysis and reporting on all study findings.

Full biographies on study contributors are on the following page.

Kemal Carr, President

**B.B.A., Management Information Systems, University of Wisconsin-Madison, Wisconsin
M.B.A. Candidate, Marketing/Management, Texas Christian University, Fort Worth, Texas**

Since founding Madison Advisors in 2001, Carr has built the company into a highly respected, independent analyst firm that provides project-based, vendor-neutral research and advisory services designed to assist clients with technology selection and business process decisions. Carr also acts as a principal analyst for Madison Advisors and leads the research and analysis efforts for Madison's ongoing market studies.

Carr is regularly engaged by leading output technology publications to write about key industry issues such as the impact of TransPromo and Multi-Channel delivery, advancements in communication technologies, and electronic document presentment. His articles have been published in *The Wall Street Journal*, *Document*, *Digital Publishing Solutions*, and *Mailing Systems Technology*. He is also a frequent speaker at trade events, including Graph Expo, Xplor's Global conference, NPES/PRIMIR Industry Summit, and DOCUMENT's Strategy Forum.

Prior to forming Madison Advisors, Carr held senior technical research and management positions at Doculabs, Fidelity Investments and Price Waterhouse.

Rich Huff

B.S., Mechanical Engineering, University of Illinois at Champaign-Urbana

Richard Huff joined Madison Advisors in 2002 as a principal analyst. Huff's expertise spans content management, publishing systems, digital printers, and electronic document delivery systems, including EOMS and EBPP. Huff assists clients with enterprise document strategies, product selection, and market development initiatives. Huff has authored articles for numerous industry publications, including *Document*, *Digital Publishing Solutions*, *High Volume Printing*, and *The Explorer*.

Prior to Madison Advisors, Huff was a senior analyst with Doculabs, where he was lead analyst for end-user and vendor consulting engagements. Huff also had eight years of experience at Uarco, Inc., a manufacturer of customized business forms and label products.

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