



# CUSTOMER COMMUNICATIONS SOLUTIONS MARKET STUDY, 5<sup>TH</sup> EDITION UPDATE

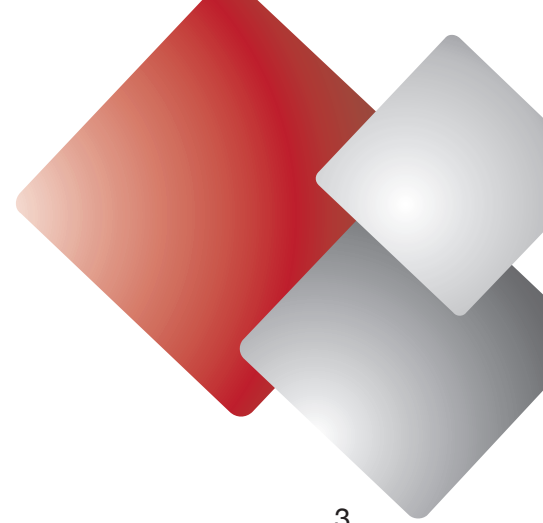
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A Madison Advisors Report / July 2013



**MADISON ADVISORS**

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# EXECUTIVE SUMMARY

Madison Advisors' examination of the customer communications management (CCM) market, in this transitional time of emerging social media contact and cloud-based infrastructure, reveals that traditional document composition solutions have pivoted to more robust CCM solutions. While most of the vendors provide robust support for electronic output formats, few offer strong support for social media channels. In addition, data analytics remains a growth area of functionality for many vendors. Key findings from the study include:

- Traditional document composition vendors support growing demand for Customer Communications Management (CCM) strategy - although a majority of Fortune 500 organizations support electronic communications including social media, many organizations have only recently begun developing a cohesive CCM strategy.
- Regardless of size, corporations reach out to customers via social media channels - studies conducted earlier in 2012 show that corporations of all sizes leverage social media to some extent to communicate with customers and prospects.
- Organizations have only recently begun to manage inbound customer communications and lack response management tools to provide uniform coverage across channels - many of the same organizations that strongly support social media, have not developed strategies or systems to manage and analyze customer responses via electronic channels.

This Madison Advisors' study, our 5th in this technology segment, covers both the supply and demand sides of the CCM market. By 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, 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. In this study, 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 have assessed.

## VENDOR PARTICIPANTS

- Aia Software ITP Enterprise 4.2
- Doxee, Enterprise Communication Platform 2.0
- EMC Document Sciences, xPression 4.5
- FIS Output Solutions, CSF Designer 11.0
- GhostDraft, GhostDraft Studio and Cloud 4.2
- GMC, Inspire
- HP Exstream, HP Exstream 8.0
- Inventive Designers, Scriptura Engage 7.1
- ISIS Papyrus Software, Papyrus 7
- OBRIEN & SolvEdge Digital-CCP 2.4
- Pitney Bowes Software, EngageOne Communication Suite
- XMPie, PersonalEffect 6.2

# REPORT OVERVIEW

This report presents the results of the CCM Solutions Market Study, and Madison Advisors' key findings based on this study. It includes the following sections:

- Section I - CCM Overview: Provides Madison Advisors' definition of customer communications management and details the various forms of document production and delivery.
- Section II - Market Trends: Provides Madison Advisors' analysis of the latest developments in the CCM market including discussions about multi-channel delivery, social media adoption, data analytics, and cloud technology.
- Section III - CCM Solution Analysis: Provides Madison Advisors' analysis of CCM solutions across four key emerging trends:
  - Multi-Channel Delivery
  - Social Media
  - Data Analytics
  - Cloud Technology
- Section IV - Provider Overviews: Provides brief reviews of each vendor participating in the study and includes software offerings and contact information. The following organizations are presented in the study:
  - Aia Software
  - Doxee
  - EMC Document Sciences
  - FIS Output Solutions
  - GhostDraft
  - GMC
  - HP Exstream
  - Inventive Designers
  - ISIS Papyrus Software
  - SolvEdge
  - Pitney Bowes Software
  - XMPie
- Appendix A - About Madison Advisors: Provides background information on Madison Advisors.

# SECTION I - CCM OVERVIEW

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

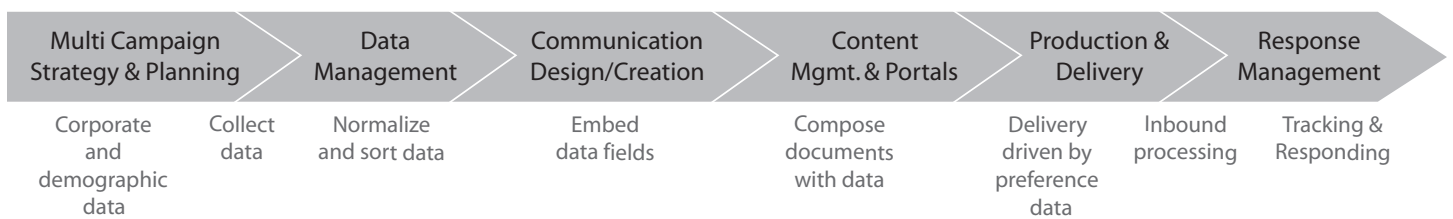


Figure 1 - Customer Communications Management Cycle

The figure above depicts the breadth of customer communications management with the communications document design and creation at its center. Traditional document composition vendors have expanded their product offerings to incorporate both upstream and downstream functions.

## IF CONTENT IS KING, DATA IS ITS QUEEN

Customer communications solutions, often referred to as document composition solutions, enable organizations to assemble relevant content and create unique documents for each customer. Organizations typically use CCM solutions to create transactional documents including statements, bills, and policies that deliver critical financial information. Oftentimes, regulations require organizations to deliver this content to customers.

CCM solutions utilize data as a connective component for customer content. Leveraging an organization's databases, a CCM solution assembles all the current content, personalizes individual components, and selects the appropriate delivery channel for each document. CCM solutions require organizations to aggressively manage its data sources to provide the most accurate information to its customers.

# DOCUMENT PROCESSES

Organizations use CCM 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

Figure 2 displays the interaction of data, composition, and output for the three composition processes.

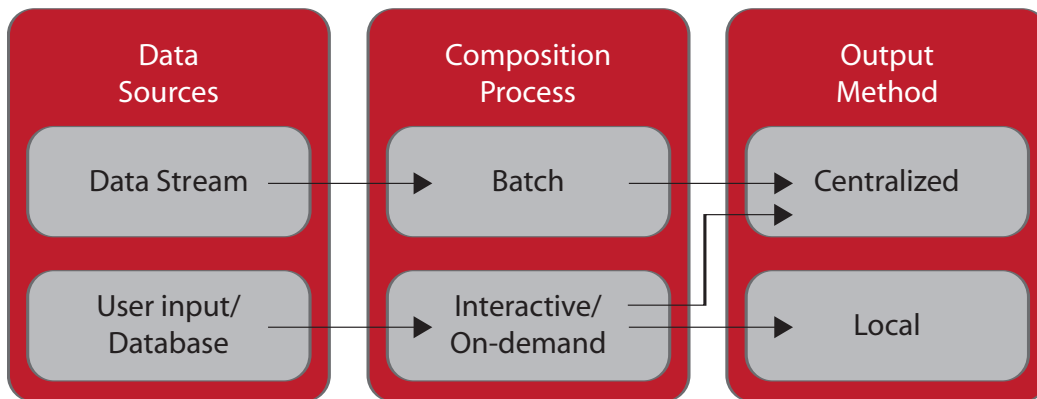


Figure 2 - Document Composition Processes



## BATCH PROCESSING

With batch processing, CCM solutions receive multiple data records for generating multiple documents in a single batch from back-office business applications, such as ERP systems, customer information systems, or 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 CCM solution 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, CCM solutions 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 or 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 completed.

## 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. If desired, the user then prints the document locally. Alternatively, the requests are stored and processed in batches to create printed outputs.

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 described above. Multi-channel communications include printed materials, online presentment, personalized URLs, e-mails, text messages, and interactions with social media. Corporate applications such as ERP, CRM, or campaign management systems generate customer communications and output documents directly or through a CCM 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 a HTML or PDF format. For current documents, the web interface calls upon a CCM solution to retrieve the most recent data from a host system and generates 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.

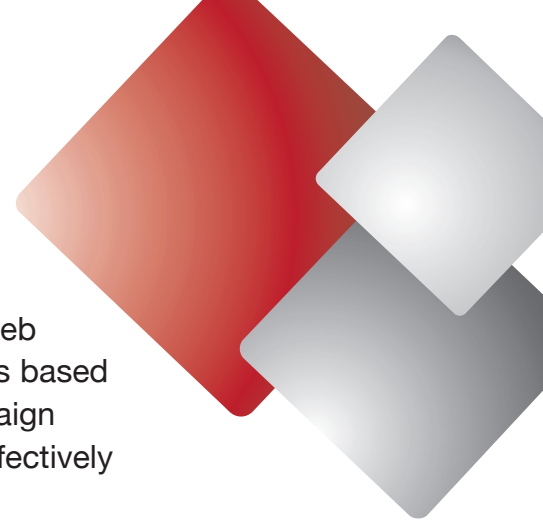
Personalized URLs contain content designed specifically to meet a consumer's interests, such as product literature or special offers. Consumers receive the unique website address for their content via printed or electronic communications. The web server hosting the personalized sites tracks which sites 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, to 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. Text-messaging utilizes the growing adoption of mobile communications to keep customers informed.

In addition to individual adoption, corporate adoption of social media channels has increased dramatically. Recent studies from the University of Massachusetts and SMB Group found that organizations of all sizes increasingly use social media mechanisms, such as blogs, Facebook, and Twitter, to send and receive communications from customers.

Corporations must utilize the unique features of each channel for successful multi-channel communications. Customers want more than re-formatted static documents from organizations. Successful multi-channel communications require organizations to combine customer-specific data and the unique abilities of each 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. Without integration between a CRM or campaign management system and a CCM solution, the organization cannot effectively implement a multi-channel customer communications strategy.



## SECTION II - MARKET TRENDS

While conducting this study, Madison Advisors uncovered several critical trends evolving in customer communications management. They include:

- Multi-Channel Delivery
- Social Media
- Data Analytics
- Cloud Technology

### MULTI-CHANNEL DELIVERY

Multi-channel communications represent a growing segment of document delivery. E-delivery mechanisms, such as e-mail, web presentment, and text messaging enable organizations to communicate more efficiently. Notifications and alerts sent electronically reach the customer faster than mailed documents and enable customers to address issues in a timely manner. The transition to electronic communications has driven a dramatic decrease in the volume of postal mail. The United States Post Office (USPS) has seen total mail volume drop from 212 billion mail pieces in 2005 to 167 billion pieces in 2011, and it projects a decline of about 10 billion pieces of mail per year in the coming years.

Customer demand drives the transition to multi-channel communications. Despite the clear cost savings of electronic communications, specifically postage costs, historically most organizations were reluctant to develop new customer communications channels. State and federal requirements for the financial and health care industries limited the ability of these organizations to shift away from paper. In contrast, the retail and food consumer verticals were not constrained by federal regulations and consequently have taken advantage of web-based and mobile communications to market to consumers. In the past two years, retail banks have aggressively expanded electronic communications to support new mobile applications.

The USPS projects a decline of about 10 billion pieces of mail per year in the coming years.

All of the participating CCM solutions support multi-channel delivery. Multi-channel support has evolved beyond electronic delivery of static documents. CCM solutions now offer capabilities such as the development of interactive document applications with links to historical documents, transactional data, and back-office systems. For example, robust PDF recipients can interact with bills to make payments electronically or dispute individual line items within the bill to trigger a resolution process. CCM solution vendors have expanded their solutions with web services interfaces and APIs that enable organizations to integrate solutions into other corporate systems for a robust customer communications strategy.

Multi-channel delivery includes both old and new channels. Traditional electronic channels include web presentment, e-mail, and SMS/text messaging. Madison Advisors' research found increasing volumes of e-mail and text messaging, although they are still considerably smaller than existing postal mail volumes. On average, e-mails represent 12% to 15% of overall communications and text messages represent 3%.

New electronic channels include digital mailbox services, such as Doxo, Zumbox, and Pitney Bowes' Volly, all of which offer a secure electronic destination for mail. Consumers sign up for a service and enterprise mailers (or their service provider partners) submit statements, bills, catalogs, and other mail electronically. Since digital mailbox services are new, their impact has yet to be seen, but Madison Advisors expects digital mailboxes to contribute to the decline in print volumes.

Printed communications remain an important channel. Many organizations utilize data analytics to make the content of their printed communications more dynamic and more personalized. Organizations are increasingly targeting customers by utilizing trans-promo communications.

On average, e-mail represents 12% to 15% of the communications and text messages represent 3%.

## SOCIAL MEDIA

Recent studies indicate strong adoption of social media by corporations. A 2012 study of social media usage by Fortune 500 companies shows an increase in the use of Facebook, Twitter, and corporate blogs, as well as new usage of YouTube and Pinterest, to communicate with customers.

The table below identifies the percentage of Fortune 500 companies actively using each social media channel in 2012 (Social Media Surge by the 2012 Fortune 500: Increase Use of Blogs, Facebook, Twitter and More, 2012, University of Massachusetts Dartmouth).

SOCIAL MEDIA CHANNEL	PERCENTAGE IN 2012	HIGHEST PERCENTAGE VERTICALS
Facebook	66%	Specialty mail, telecommunications, and food consumer products
Twitter	73%	Food consumer products
Corporate Blog	28%	Telecommunications, banking, retail, and utilities
YouTube	62%	Financial services
Pinterest	2%	Retail and food consumer products

Table 1 - Social Media Adoption by Fortune 500

Social media channels enable organizations to communicate directly with customers. Fortune 500 corporations use social media to provide consumers with corporate information, product details, hiring opportunities, social responsibility updates, and community causes. Corporate Facebook and Twitter accounts provide bi-directional communications with consumers, which allow organizations to identify new customers, respond to dissatisfied customers, and share information with the general public. In addition to providing a corporate identity, a majority of corporate blogs accept comments, provide news feeds, and allow subscriptions. YouTube accounts allow organizations to provide significant details on a product's new features and functionality. Pinterest draws new customers to a corporation's products with photos, recipes, and other information.

Similar studies examined the adoption of social media channels by medium and small enterprises. In general, more than half of the organizations in these segments, particularly in the retail and consumer-oriented verticals support one or more social media channels. Small businesses can quickly create an online presence, and often find a more level playing field, when compared to print channels for marketing to new customers.

Social media channels offer different features for use in electronic documents. Although primarily text based, social media communications work best when leveraging images, links, and personalized data. With a CCM solution, organizations create marketing communications, service notifications, and other non-transactional documents with images, links to corporate data, or to other social media channels. By combining channels, organizations generate an interactive experience combining text, images, and video.

In this market study, Madison Advisors found few CCM solutions supporting personalized responses to social media activity. Organizations use web monitoring tools to track corporate reputations and references to their organization or brands across social media accounts. Using business rules and data analytics, CCM solutions can create personalized responses based on key words in the social media posting.



## DATA ANALYTICS

Effective customer communications rely on data. Organizations typically have customer data distributed across multiple legacy systems or integrated with transactional output, which the CCM solutions can extract and utilize to create documents. Document composition solutions traditionally excel at receiving data from multiple sources to create transactional documents.

Successful CCM strategies require relevant and timely communications. During our research, Madison Advisors found that CCM solution vendors have added data analytics to examine data, identify trends, and generate datasets for CCM campaigns. CCM vendors offer modules or packaged integration to response data sources, such as imaging systems, e-mail delivery tracking, or social media monitors. In addition, solutions can collect response data from online marketing campaigns or quick-response (QR) code applications. This new functionality enables the CCM solutions to analyze response data and generate new communications.

Leading-edge organizations capture and analyze as much customer data as possible. By collecting response data, organizations can respond to customer demands and identify trends faster than those organizations relying on monthly reports. Madison Advisors found that organizations providing more relevant and timely customer communications maintained high customer loyalty and utilized the data to cross-sell additional products and services to existing customers.

Unfortunately many organizations do not analyze response data. These organizations lack the tools to quickly collect responses or cannot unify customer data from multiple lines of business into a single view of the customer. In many cases, lines of business within an organization maintain their own customer contact and customer preference databases, which may result in inconsistent customer communications. Data management solutions, whether integrated with CCM solutions or not, enable organizations to consolidate customer data into a single record to provide organizations with a 360-degree view of each customer, including all transactions across all lines of business.

## CLOUD TECHNOLOGY

A growing number of CCM solution vendors offer Software-as-a-Service (SaaS) solutions using cloud platform technology. The emergence of cloud computing platforms with improved reliability and security make it a viable solution for corporate enterprises. As a result, software vendors have been able to expand the licensing models available to organizations. SaaS solutions operate in a hosted environment and utilize web browser clients to access the software. Software does not need to be installed at the desktop or at the client's site, which enables organizations to easily deploy solutions across a distributed enterprise. The platform's flexibility allows the vendor, the organization, or a third-party to maintain and manage the software and its hardware platform.

Several CCM vendor participants in this study offer SaaS solutions. The SaaS technology changes the traditional paradigm from client-server software to one without software client. For organizations, the SaaS approach eliminates the burden of installing software on remote desktop systems and re-installing new software every time the vendor releases an update. The solution also supports collaborative document design and centralized data and content management. For vendors, the SaaS approach creates the ability to offer flexible licensing to small and medium-sized enterprise organizations.

Madison Advisors expects continued growth in this segment as vendors seek to deliver CCM solutions to small and mid-sized enterprises without the costly hardware overhead or software licensing for large batch operations. Document composition solutions have matured from the traditional very high-volume batch print production to nimble solutions for a wide range of document types and document processes. Madison Advisors believes that this transition will make CCM capabilities available to a broad corporate audience.


## SECTION III - CCM SOLUTIONS 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 CCM solution.

Over the past five years, all of the vendors have expanded their solutions to support the three document processes: batch, on-demand, and interactive. All of the solutions highlighted in this study offer robust graphical user interfaces for document design, data processing, interactive document creation, and output management. Each solution supports a different combination of print and electronic formats. Additionally, each solution runs under multiple operating systems or web servers.

For this study, Madison Advisors compared the relative strength of each solution in regard to support for the emerging CCM trends: multi-channel output, social media support, data analytics functionality, and support for cloud-technology. Organizations should consider which, if any, of these trends apply to their current environment and CCM strategy. No one solution will be the best fit for all organizations.

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 IV) of this report.



CCM VENDOR	MULTI-CHANNEL	SOCIAL MEDIA	DATA ANALYTICS	CLOUD TECHNOLOGY
Aia Software	X	X	X	X
Doxee	X	X	X	X
EMC	X	X	X	X
FIS Output Solutions	X	X	X	X
GhostDraft	X	X	X	X
GMC Software	X	X	X	X
HP Exstream	X	X	X	X
Inventive Designers	X	X	X	X
ISIS Papyrus Software	X	X	X	X
SolvEdge	X	X	X	X
Pitney Bowes Software	X	X	X	X
XMPie	X	X	X	X

Table 2 - CCM Solutions Comparison Against Key Trends

		MULTI-CHANNEL	SOCIAL MEDIA	DATA ANALYTICS	CLOUD TECHNOLOGY
Strong	X	Solution delivers documents across multiple electronic channels	Solution provides tools for managing social media and delivering documents to social media channels	Business intelligence / analytics solutions available from vendor	Cloud-based platform solution available from vendor
Average	X	Composition engine produces multi-channel output, including print, e-mail, SMS, and web	Solution provides tools for delivering documents to social media channels	Data processing tools (ETL tools) available from vendor	Product architecture supports cloud-based deployment
Marginal	X	Composition engine does not produce e-delivery outputs	Solution does not interact directly with social media applications	No data management tools available	Product architecture does not support cloud-based deployment

Figure 3 - Legend for CCM Solutions Comparison Table

Table 2 above shows the efforts that CCM solution vendors have made towards addressing the four trends identified earlier.

While all of the CCM solutions support multiple print and electronic output formats, Madison Advisors found that some vendors, such as Doxee, GMC, and Inventive Designers have added functionality to monitor the status of electronic documents and respond appropriately. For example, an undelivered e-mail regarding a financial issue could result in a paper copy being printed and mailed. Other vendors may offer integration to third-party systems that manage e-mail and SMS/text delivery. XMPie offers designers the unique capability to embed personalized images and video segments into customer communications.

ISIS Papyrus Software and HP Exstream are among the vendors that provide robust support for social media channels due to its status as an emerging customer communications channel. But since social media is unlikely to be adopted as a preferred channel for many document types, such as financial statements and healthcare notices, it is not a high priority for some CCM vendors. As social media channels continue to evolve and adoption increases, more CCM vendors will support robust, bi-directional communications and status monitoring through these channels.

In the previous version of its Market Study, Madison Advisors identified advanced data management functionality as a key area of development. FIS Output Solutions and Pitney Bowes Software provide tools for both front-end data cleansing and back-end response management. In addition, vendors, such as Aia Software, have developed interfaces to separate business data functions from IT data functions to simplify the complexities of data management. Over the past two years, most vendors have added robust data processing tools and several have added business intelligence and data analytics modules to their CCM solutions. New functionality includes customer segmentation, data cleansing, and predictive analysis. Organizations use these functions to bundle and process large volumes of data from multiple sources in order to deliver timely and relevant customer communications.

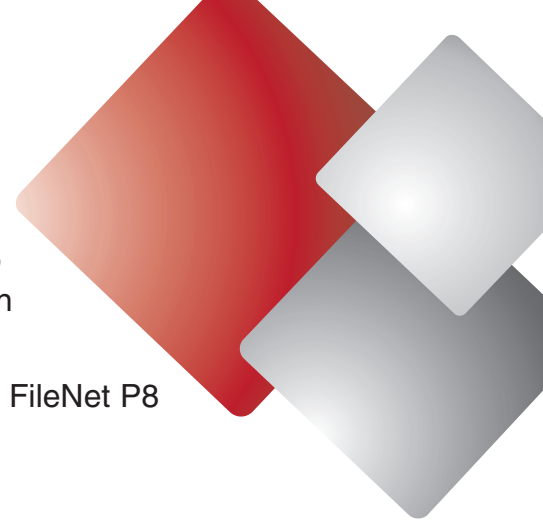
Within data analytics, response management still represents an area of opportunity for most CCM solutions. CCM solution vendors offer various levels of reporting, but only a few capture inbound communications, track response rates, and integrate with response management modules within CRM systems. Organizations require response reporting and analysis of the response data to determine if a customer communications campaign has been successful.

Again, all of the multi-channel solutions support a wide range of output formats suitable for print and electronic delivery channels. In addition, some vendors, such as OBRIEN provide full output management and item tracking. Pitney Bowes Software offers solutions for management and delivery of both printed documents and e-mail.

For many organizations, integration of a new solution with its existing content and data systems presents a significant challenge.

Organizations often contend with corporate content distributed across multiple digital archives. To simplify customer communications, CCM solutions must be able to access and leverage the content within existing corporate systems. EMC xPression offers out-of-the-box integration with its own content management solutions as well as IBM FileNet P8 and IBM OnDemand.

Corporate adoption of cloud platforms faces several hurdles. Regulated organizations, such as financial services and insurance, need more confidence in the security and reliability of cloud-based platforms before relying on these solutions to manage personal data. Most CCM solutions have been architected to allow for hosted environments, while others, such as Doxee and GhostDraft work almost exclusively as a hosted solution. Hosted offerings can provide cost savings to small or distributed organizations that lack the resources to manage a large implementation.



## SECTION IV - CCM SOLUTIONS VENDOR PROFILES

In this section, Madison Advisors provides brief reviews of each CCM vendor in the study, including software offerings and contact information. Presented alphabetically, these vendors include:

- Aia Software
- Doxee
- EMC Document Sciences
- FIS Output Solutions
- GhostDraft
- GMC
- HP Exstream
- Inventive Designers
- ISIS Papyrus Software
- SolvEdge
- Pitney Bowes Software
- XMPie



Aia Software ITP Enterprise 4.2		
Company Overview	Headquarters: Revenue: Employees:	Nijmegen, The Netherlands Private Private
Product Focus	ITP Enterprise 4.2 creates templates for batch and interactive document processing with support for multiple languages. ITP Enterprise 4.2 provides centralized document composition and post-processing from templates stored in a database repository. ITP Enterprise 4.2 offers out-of-the-box integration with SAP and an integration framework for connections to Microsoft CRM and Microsoft SharePoint. The solution supports integration through .NET, Java, and TCP/IP.	
Multi-Channel Support	ITP Enterprise 4.2 composes print and electronic output formats. ITP Enterprise 4.2 provides an SMTP interface to e-mail servers, and its customers use the solution for electronic document creation.	
Hosting	A number of Aia Software partners offer ITP Enterprise 4.2 as a hosted solution for document production.	
Platform Support	<b>Server</b>	<b>Client</b>
	Windows Server 2003 SP1 & R2 Windows Server 2008 & R2	Windows XP and higher Every modern browser is suited to support end users
Product 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 Enterprise 4.2.	
Contact Information	Tim van Hugte PO Box 38025 6503 AA Nijmegen The Netherlands +31 24 371 02 30 t.van.hugte@aia software.com <a href="http://www.aia software.com">http://www.aia software.com</a>	

Table 3 - Aia Software ITP Enterprise 4.2 Profile





DOXEE ENTERPRISE COMMUNICATION PLATFORM 2.0		
Company Overview	Headquarters: Revenue: Employees:	Modena, Italy Private 131
Product Focus	Doxee's Enterprise Communication Platform enables organizations to produce high-volume transactional and trans-promotional documents. The platform supports batch, on-demand, and interactive production, allowing organizations to design, produce and deliver documents for and through multiple channels. Built from the ground up as a SaaS solution, the Java-based platform enables organizations to monitor the end-to-end document production lifecycle.	
Multi-Channel Support	With Doxee, a document is designed once and the system generates appropriate output depending on the type of output channel chosen by the user. This enables an integrated multichannel distribution system that supports print as well as digital channels including e-mail, web, fax, SMS, smart devices, FTP, and more.	
Hosting	As a SaaS solution, the platform allows print service providers to deliver services without heavy software clients. Enterprises that have deployed the solution internally can also distribute CCM functionality, without numerous software installations, using the solution's browser-based interfaces.	
Platform Support	<b>Server</b>	<b>Client</b>
	Red Hat Linux 5 Windows 2008 App Servers: Jboss WebSphere	WindowsXP Windows Vista Windows 7 Macintosh Linux
Product Support	Doxee Service Desk provides the first line of contact and addresses issues or routes issues to Level 2 support. Channel partners also provide Level 1 support where applicable.	
Contact Information	Kashif Mahbub 408-961-7416 Kashif@doxee.com www.doxee.com	

Table 4 - Doxee Enterprise Communication Platform 2.0 Profile



EMC DOCUMENT SCIENCES xPRESSION 4.5		
Company Overview	Headquarters: Revenue: Employees:	Hopkinton, MA \$21.7 B (2012) 60,000
Product Focus	<p>EMC Document Sciences xPression enables organizations to produce timely, accurate and personally relevant customer communications for multi-channel delivery using familiar software tools such as Microsoft Word, and provides fully embedded, interactive, thin-client editing capabilities. xPression enables clients to standardize on a single solution, either on-premise or in the cloud, to generate a wide variety of communications interactively, via workflow, in batch, or on-demand.</p> <p>xPression offers out-of-the-box integration with EMC Documentum and EMC Documentum xCP, providing comprehensive CCM capabilities including BPM, content management, archive, workflow, interactive editing, and distribution as part of the complete solution. xPression also offers out-of-the-box integration with IBM FileNet P8 and IBM OnDemand.</p>	
Multi-Channel Support	xPression generates rich multi-channel content for delivery to print, email, web, and mobile devices. A single rules-based template controls channel-specific content and optimizes channel-specific formatting.	
Hosting	xPression is available as a fully managed service directly from EMC via EMC OnDemand, a secure, state-of-the-art private cloud environment that is managed by EMC experts and dramatically reduces TCO. EMC OnDemand provides each client with its own dedicated operating environment independent of other clients. EMC also implements the solution on-premise.	
Platform Support	<b>Server</b>	<b>Client</b>
	Windows Server 2008 R2 Sun Solaris 10 U10 IBM AIX 7.1 Red Hat Enterprise Linux 5.8 and 6.2 SUSE Linux 11 SP2	Windows XP SP3 Windows 7 Windows 2008 R2 Macintosh Snow Leopard Macintosh Lion
Product Support	The EMC Global support network provides product upgrades, services packs and patches, as well as 24x7 remote support services and direct access to EMC experts, via telephone, web, and online chat, for product-specific issues regarding installing and operating EMC software.	
Contact Information	EMC Document Sciences 5958 Priestly Drive Carlsbad, CA 92008 (760) 602-1400 mailto:docscience@emc.com	

Table 5 - EMC Document Sciences xPression 4.5 Profile



FIS OUTPUT SOLUTIONS CSF DESIGNER 11.0		
Company Overview	Headquarters: Revenue: Employees:	Jacksonville, Florida \$5.75 B (2011) 33,000
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. CSF Designer Workstation enables authoring of templates for batch, on-demand (CSF Re@ltime), and interactive (CSF Designer Intuition) application environments.	
Multi-Channel Support	A majority of CSF Designer clients use the product to create e-mail or web-delivered content. FIS has partnered with Voltage to deliver encrypted PDF content via e-mail. CSF offers packaged integration with Connections, and FIS CRM system deployed at over 150 banks.	
Hosting	FIS offers CSF Designer and its companion products as a hosted service along with a wide range of banking solutions	
Platform Support	<b>Server</b>	<b>Client</b>
	z/OS z/Linux Sun Solaris IBM AIX HP-UX Linux Windows	Windows (CSF Designer) Internet Explorer v6.0 (DesignerWeb)
Product Support	FIS provides its own product support (24 x 365). In addition, FIS operates a partner-certification program that allows domestic and international third-parties to become "CSF Designer-certified". Outside of North America, certified resellers provide professional services.	
Contact Information	John Price (414) 815-4530 John.F.Price@fisglobal.com www.fisglobal.com	

Table 6 - FIS Output Solutions CSF Designer 11.0 Profile



GHOSTDRAFT STUDIO AND CLOUD 4.2		
Company Overview	Headquarters: Revenue: Employees:	Toronto, ON Private 350
Product Focus	<p>GhostDraft Studio provides business users with a Microsoft Word-like interface for developing document rules and layouts independent of the data structure. The product includes a natural language interface for creating data processing and formatting rules with real-time logic validation. It also enables users to create data capture screens for interactive data entry and share common objects between templates and projects.</p> <p>GhostDraft Cloud is a SaaS offering for creating and managing customer documents. The service supports batch, on-demand, and interactive document production. The solution enables organizations to control content and branding, while allowing for flexible workflow processes.</p>	
Multi-Channel Support	GhostDraft supports multichannel output including print, e-mail, and SMS message delivery through a single composition engine. In addition, GhostDraft provides secure, encrypted storage of documents for e-presentation and archive. The solution delivers output to clients based on delivery channel preferences.	
Hosting	GhostDraft provides access to its document production service through the cloud using Windows Azure, Microsoft's hosting environment. The solution's authorization and authentication mechanisms enable multiple customers to securely share the same infrastructure.	
Platform Support	<b>Server</b>	<b>Client</b>
	Cloud-based	Windows 7 and above
Product Support	GhostDraft provides telephone (800 number), email and web-based issue reporting. Its users can ask questions or report issues via any of these mechanisms. After-hours emergency support is provided by telephone. GhostDraft offers onsite and online training for customers who are new to GhostDraft Studio or GhostDraft's data mapping tool. GhostDraft also offers professional services for simple project guidance or full turnkey solutions.	
Contact Information	Michael Sauber (484) 681-4944 Michael.Sauber@GhostDraft.com	

Table 7 - GhostDraft Studio and Cloud 4.2 Profile

GMC INSPIRE		
Company Overview	Headquarters: Revenue: Employees:	Appenzell, Switzerland Private Private
Product Focus	<p>GMC Inspire 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.</p> <p>Inspire allows Web-based users to create and edit documents and marketing messages based on templates created in the document design interface.</p>	
Multi-Channel Support	Using a single design template, Inspire optimizes the output for a range of print and electronic channels including e-mail, SMS, mobile, tablets, fax, and social media.	
Hosting	GMC Inspire operates in a Web Services environment and can be deployed into a hosted cloud (or an enterprise cloud implementation). Inspire integrates with other hosted services and back-office applications, including database applications and CRM systems.	
Platform Support	<b>Server</b>	<b>Client</b>
	SUSE Linux RedHat Linux Solaris IBM AIX Windows	Windows Internet Explorer
Product 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 8 - GMC Inspire Profile



HP EXSTREAM 8.0		
Company Overview	Headquarters: Revenue: Employees:	Palo Alto, California \$127.4 B (2011) 332,000
Product Focus	<p>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.</p> <p>HP Exstream offers out of the box integration with IBM Content Manager, Day Software, and HP TRIM, as well as Autonomy. The solution shares assets with Autonomy LiveSite/TeamSite for content approval and multi-channel communications</p>	
Multi-Channel Support	<p>HP Exstream delivers content to virtually any print or electronic delivery channel including XML, HTML, SMS, RSS, and social media sites. HP Exstream integrates with Autonomy LiveSite for connectivity to the web, mobile devices, and social media. The engine applies the appropriate attributes to various content elements for each channel.</p>	
Hosting	<p>HP Exstream can be deployed in a hosted environment.</p>	
Platform Support	<b>Server</b>	<b>Client</b>
	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
Product Support	<p>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.</p>	
Contact Information	Harold Jackson 810 Bull Lea Run Lexington, KY 40511 (859) 296.0600 hjackson@hp.com www.hpexstream.com	

Table 9 - HP Exstream 8.0 Profile



INVENTIVE DESIGNERS SCRIPTURA ENGAGE 7.1		
Company Overview	Headquarters: Revenue: Employees:	Antwerp, Belgium €4.2 M (2009) 40
Product Focus	Scriptura Engage is a multi-channel communications platform that enables organizations to design and deliver personalized customer communications and track their responses, depending on content and context. 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. Scriptura Engage can be integrated with any CRM or ERP solution via Web Services or its API with pluggable components.	
Multi-Channel Support	In addition to print and email, Scriptura Engage also delivers communications via SMS, social media, and push notifications.	
Hosting	Composed of “pure” Java code, Scriptura Engage can be deployed in a hosted environment and has no direct dependence on the underlying operating system	
Platform Support	<b>Server</b>	<b>Client</b>
	Windows (all 32-bit and 64-bit editions) Mac OSX Unix (HP-UX, IBM AIX, Sun Solaris) Linux i5	Windows XP Windows Vista Windows 7 Windows 8
Product 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	Geert Segers Sint-Bernardsesteenweg 552 B-2660 Hoboken Belgium +32 (3) 821 01 80 geert_segers@inventivedesigners.com www.inventivedesigners.com	

Table 10 - Inventive Designers Scriptura Engage 7.1 Profile



ISIS PAPYRUS 7		
Company Overview	Headquarters: Revenue: Employees:	Maria Enzersdorf, Austria (Global) €62 M (2011) (Global) 350 (Global)
Product Focus	<p>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 both inbound and outbound communications to trigger additional steps in the workflow model.</p> <p>ISIS Papyrus includes specific interfaces for SAP, Siebel, MS-CRM, and SOA interfaces to many SaaS applications such as Salesforce, Google Docs, LinkedIn, as well as full support for the Oasis CMIS archive interface.</p>	
Multi-Channel Support	<p>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.</p>	
Hosting	<p>Papyrus can be implemented as a hosted service via business partners who purchase the software for each client and host the software and customer applications, as needed</p>	
Platform Support	<b>Server</b>	<b>Client</b>
	z/OS z/Linux Unix (AIX, HP-UX, Sun Sparc, Solaris) Windows Intel Linux Mac OSX	Unix (AIX, HP-UX, Sun Sparc, Solaris) Windows Intel Linux Mac OSX Apple iOS and Android mobile platforms
Product Support	<p>Papyrus Support Centers provide support for all customers. Papyrus offers also Project Quality Assurance support with in-house consultants, who support the handover from installation to the customer staff and requested application changes, and software upgrades or migrations.</p>	
Contact Information	<p>ISIS Papyrus America, Inc. 301 Bank St Southlake, TX 76092 (817) 416-2345 info@isis-papyrus.com www.isis-papyrus.com</p>	

Table 11 - ISIS Papyrus 7 Profile



OBRIEN /SOLVEDGE DIGITAL- CCP 2.4		
Company Overview	Headquarters: Revenue: Employees:	Bartlett, IL Private Private
Product Focus	SolvEdge's Digital - Collaboration & Communications Platform is a single source customer communication platform that enables organizations to create and manage business correspondence. Digital-CCP streamlines internal and external communication process using a built-in workflow approval and business rules. Digital-CCP eliminates the need for programming and can be customized for any platform.	
Multi-Channel Support	Digital-CCP supports multi-channel output which includes print and electronic outputs. The software product generates output based on delivery channel preferences. The products own e-mail server handles both internal notifications and external document delivery. A Web Services API enables integration to external applications. And the product offers existing iPad applications for remote data collection.	
Hosting	As a fully browser-based solution, the product can be utilized in a hosted environment to collect data and generate multi-channel output. OBRIEN hosts the application to support outsourced print services. OBRIEN utilizes a consultative approach to develop custom document applications with embedded workflow processing to minimize programming.	
Platform Support	<b>Server</b>	<b>Client</b>
	App Servers: Jboss WebLogic	Browser
Product Support	OBRIEN customer service acts as the first line of contact and provides Level 1 support. OBRIEN provides Level 2 support and professional services.	
Contact Information	Mike Mulcahy (630) 483-6404 mike_m@obinc.com	

Table 12 - OBRIEN SolvEdge Digital-CCP 2.4 Profile



PITNEY BOWES SOFTWARE ENGAGEONE COMMUNICATION SUITE		
Company Overview	Headquarters: Revenue: Employees:	Stamford, Connecticut \$5.3 B (2011) 31,000
Product Focus	<p>The solution allows users to create document templates usable 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 presentation of customer communication.</p> <p>Pitney Bowes Software provides solutions for address cleansing, data quality, advanced customer analytics and campaign management.</p>	
Multi-Channel Support	EngageOne supports multiple channels including print, email and SMS messages. Its integrated engine manages the delivery and bounce reporting of email/SMS communications with built in digital signature support. Bounced documents can be placed into a CRM workflow for distribution via an alternate channel.	
Hosting	EngageOne can be deployed in a hosted environment.	
Platform Support	<b>Server</b>	<b>Client</b>
	z/OS, OS/390, and OS/400 Unix (AIX, HP-UX, Red Hat Linux, Sun Solaris) SUSE Linux on z/OS, Open VMS Windows	Windows XP Windows 2000 Windows 2003 Windows Vista Windows 7
Product Support	Pitney Bowes technical support organization includes first line and second line analysts. Pitney Bowes offers client support globally and is available 24/7. Third level support is provided through the engineering organization	
Contact Information	Pitney Bowes Software One Global View Troy, NY, 12180 (800) 327-8627 pbbi.sales@pb.com www.pbinsight.com	

Table 13 - Pitney Bowes Software EngageOne Communication Suite Profile



XMPiE PERSONALEFFECT 6.2		
Company Overview	Headquarters: Revenue: Employees:	New York, NY Private 100
Product Focus	<p>XMPiE's PersonalEffect software leverages the Adobe Creative Suite platform. PersonalEffect enables designers to create, deploy, and track campaigns consisting of individually personalized customer communications. The product modules support a full range of personalized content including variable data print, personalized email, web landing pages, images and video. XMPiE has a variety of offerings including desktop tools, turn-key systems, enterprise platforms, and cloud-based services.</p> <p>XMPiE Circle is a SaaS offering for visually describing and diagramming the campaign flow of a multichannel campaign. The drag-and-drop interface allows designers to map all elements, activities, touch points, and deliverables within a virtual storyboard where mock-ups and document previews can be shared with all stakeholders.</p>	
Multi-Channel Support	XMPiE provides robust multichannel communications including print, web, e-mail, video, and SMS message delivery. All channels are integrated using the same data and business logic in a central composition engine.	
Hosting	Depending on the need, XMPiE offers PersonalEffect as either a licensed or cloud-based solution for organizations looking to integrate traditional communications with PURLs or e-mails. In addition, XMPiE Circle enables organizations to plan, visualize and collaborate on digital storyboards for CCM campaigns and is a true cloud-based, SaaS solution.	
Platform Support	<b>Server</b>	<b>Client</b>
	Windows Server 2008 Windows Server 2012	Windows XP, 7, and 8 Mac OS X 10.5 or 10.6
Product Support	XMPiE offers support for its products through a web portal, e-mail, and telephone. Xerox EU, Fuji-Xerox and some reseller partners also offer support. XMPiE provides extensive training options and holds an annual user group conference.	
Contact Information	Judy Berlin (516) 740-1151 Judy.Berlin@xmpie.com	

Table 14 - XMPiE PersonalEffect 6.2

## APPENDIX A - 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 short-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 short-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 our web site:

[www.Madison-Advisors.com](http://www.Madison-Advisors.com)