

Print Suppression Market Study

May 2009

STUDY PROSPECTUS

STUDY OBJECTIVES

- To identify true print suppression rates within the Fortune 500 market by vertical and application
- To provide end users with an in-depth analysis of the cost savings to be gained by moving to multi-channel delivery
- To identify best practices and techniques for increasing consumer adoption of electronic delivery
- To assess the impact on existing hardcopy market solutions and identify strategies for successful transition to a multi-channel delivery approach
- To help provide guidance to end users regarding electronic delivery and print suppression, and their benefits

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INTRODUCTION

Madison Advisors' 2009 Print Suppression Market Study examines Fortune 500 market interest and activity around print suppression and electronic adoption of customer communications. Through this study, we will assess the current state of electronic adoption rates, including print suppression drivers and inhibitors. As a result, we will identify best practices to help organizations mitigate risks and cost while positioning themselves ahead of the adoption tipping point in this market.

Madison Advisors will provide participants in the initial study with an advance copy of the study results and a customized presentation on best practices and techniques to drive higher suppression rates.

This prospectus includes:

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OPEN INVITATION

Madison Advisors has invited a wide sampling of organizations to participate in this Study, including:

- Allstate Insurance
- American Electric Power
- Bank of America
- Capital Group
- Capital One
- Charles Schwab
- Cigna
- CitiGroup
- Citizens Bank
- Farmers Insurance
- Fidelity Investments
- The Hartford
- Humana
- ING
- KeyBank
- LPL Financial
- Mutual of Omaha
- Nationwide Insurance
- Northwestern Mutual
- Portland Electric
- Principal Financial
- Progress Energy
- Toyota Financial Services
- UBS
- USAA
- Vanguard Investments
- Wells Fargo / Wachovia

The above list is a partial list of invitees. Participation in this study is open to all interested parties. If you feel that your organization should be included in the study, please contact Madison Advisors to discuss participation.

RESEARCH PROGRAM

Madison Advisors' Print Suppression Market Study is now underway and the results will be published in July, 2009.

METHODOLOGY

For this study, Madison Advisors will conduct extensive research on electronic displacement of the current hardcopy distribution of customer communications and the print suppression rates of those documents, either by customers or organizations. For the purpose of this study, suppression refers to regulated and non-regulated documents. For such documents we will assess adoption and retention strategies and drivers, and the resulting social and environmental impacts. We will also survey the technology suppliers to this market, both hardware and software, to assess impact across key markets

We will engage each participant in surveys and in-depth interviews with key stakeholders and decision makers. After the research efforts are complete, Madison Advisors will conduct a thorough analysis of the findings and publish the results in our *Print Suppression Market Study*.

SCHEDULE

Participation is available on a first-come, first-served basis. Contact Madison Advisors now for inclusion in the study.

May 12th – May 22nd	Study Registration
May 26th – June 19th	Research Phase
June 15th – July 10th	Analysis & Production
Week of July 13th	Publication of Study

PARTICIPATION FEES

Madison Advisors is waiving the participation fee for the initial study in exchange for the right to name your organization as a participant. Subsequent studies will include a research fee.

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ANALYSIS & DELIVERABLES

Madison Advisors' analysts will conduct a thorough analysis of the research findings to identify the key trends and drivers that are shaping today's customer communications market. The results of this analysis will be published in Madison Advisors' *Print Suppression Market Study*.

This publication will include:

- **Section I – Industry Overview:** Definition and current state of the hardcopy customer communication market.
- **Section II – Market Trends:** Analysis on the trends currently affecting print suppression and multi-channel delivery.
- **Section III – Market Analysis:** Qualitative review of the adoption rates of hardcopy suppression and multi-channel distribution of customer communications employed by the participant organizations in the study. (Note: the analysis will be provided by vertical and application, but will not discuss the strategies and practices of individual organizations to protect confidentiality.)
- **Section IV – Case Studies:** A brief review of select participants in the study, including market leading techniques and best practice trends. (Madison Advisors will work with the Case Study organizations to determine if they can be named.)

RESEARCH FOCUS AREAS

Madison Advisors' Print Suppression Market Study is designed to rigorously review how leading organizations are addressing consumer and organizational demand for the suppression of hardcopy customer communications and the transition to multi-channel delivery. To do this we will assess the market focus areas described below.

STRATEGIC DIRECTION

The assessment of each participant's strategic direction for print suppression and multi-channel delivery:

- Market direction and outlook
- Totality of customer communication strategy
- Suppression services and direction
- Electronic delivery scalability
- Transference strategy

TACTICS FOR SUCCESS

The assessment of the tactics and practices being utilized by each participant to support their strategies for print suppression and multi-channel delivery, including:

- Outsourcing considerations
- Hardware and software
- Practices and processes

MARKET DRIVERS & TRENDS

A review of print suppression and multi-channel delivery drivers and trends across market segments, including:

- Verticals
- Applications
- Organization size
- Consumer demographics

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ADDRESSING THE MARKET

Madison Advisors' *Print Suppression Market Study* will provide answers to the following market questions.

From the perspective of the general market:

- What are the market suppression rates?
- What are the key adoption drivers?
- What are the major inhibitors?
- What impact does technology have on future rates of electronic adoption and print suppression?
- Who will be the winners and losers in the future delivery paradigms?
- What are the best practices for multi-channel delivery strategies?

From the perspective of the study participants:

- How is the organization tracking relative to peers in the areas of print suppression and multi-channel delivery?
- What strategies or technologies are driving rapid adoption?
- How strong is the Green movement in driving the suppression strategy?
- How does the organization compare to competitors for print suppression and multi-channel delivery?
- Are there other cost savings opportunities available beyond those directly related to print suppression?
- How does the organization benefit by supporting multi-channel customer communication?

RESEARCH FOCUS AREAS, CONTINUED

SAVINGS

The assessment of the savings – actual and projected – to be recognized from print suppression and multi-channel delivery strategies across multiple business areas, including:

- Print
- Call center support
- Marketing

BENEFITS & GAINS

The assessment of the benefits and/or gains to the business outside of cost savings, including areas such as:

- Customer experience
- Market leadership position
- Green impact
- Marketing cohesiveness

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BENEFITS OF PARTICIPATION

Participants benefit from the industry expertise and perspective provided by Madison Advisors' analyst team throughout the study. For example, during the survey and interview phase of the study, your organization will receive:

- Candid feedback from Madison Advisors' analysts on the key strengths and potential challenges of your strategies and plans for print suppression and multi-channel delivery
- Insight into how the industry – as a whole and your peer group – is progressing with print suppression and multi-channel delivery strategies
- The opportunity for one-on-one Q&A with Madison Advisors analysts

Upon completion of the study, Madison Advisors will provide your organization an advance copy of the study results and a custom presentation in which we provide a critique of your organization's strategy. One of Madison Advisors' core services is advising Fortune 1000 companies on their enterprise output strategies. Specifically, we offer our analyst expertise, first-hand solution knowledge, and market research to advise our clients with their mission-critical decisions. Our critique of your organization's strategy for print suppression and multi-channel delivery will draw upon this extensive knowledgebase to provide you with practical insights into how to advance your strategies.

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PARTICIPATION REQUIREMENTS

Madison Advisors developed the following requirements to ensure that we assess all industry data consistently. Please adhere to these requirements to optimize your organization's study participation.

- **Complete and return the attached Participation Agreement** to secure your participation in the study.
- **Participate in a scheduled, 30-minute conference call at the beginning of the study.** This is an opportunity for Madison Advisors to fully explain the scope of the study, requirements, timelines, etc., and to answer your questions.
- **Complete the study survey and participate in a one-hour interview.** Please complete the brief study survey within one week of receiving it. After completing the survey, please plan to participate in a teleconference interview with Madison Advisors to further discuss your survey responses, provide additional information, etc.
- **Plan to be available for follow up Q&A.** In the weeks following your interview, Madison Advisors may need to contact you again for additional information, to clarify data, etc.
- **Confirm that your organization can be named as a participant in the study.** Madison Advisors is waiving the participation fee for the initial study in exchange for the right to name your organization as a participant. Madison Advisors will maintain your organization's specific information as confidential data, and share only aggregated industry information in the study.

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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.

Madison Advisors Market Studies include:

- 2008: *Service Provider Market Pricing Study, Second Edition*
- 2008: *TransPromo Workflow Market Study*
- 2008: *Document Composition Market Study, Third Edition*
- 2007: *Service Provider Market Pricing Study*
- 2006: *Document Composition Market Study, Second Edition*
- 2005: *Enterprise Output Management System Market Study*
- 2004: *Document Composition Market Study*

For more information about Madison Advisors, visit our web site – www.Madison-Advisors.com.


PARTICIPATION AGREEMENT

Please fax a signed copy of this order agreement to Madison Advisors.

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Contact Information	Organization (EU)	Billing
Company name Street address City, State, Zip Contact name Contact phone Contact e-mail		N/A

Study Participation Scope	Check all that apply:	
	<input checked="" type="checkbox"/> Participation	included
	<input checked="" type="checkbox"/> Customized advisory presentation	included
Total Cost	Total:	n/a

Participation Agreement	Client name and title	Madison Advisors Officer
		Kelley West, Vice President
	Client signature	Signature
		
	Date:	Date: May 12, 2009