



Document
Management
Market Forecast:
2012 - 2016

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Market Assessment
September 2012

About NelsonHall

NelsonHall is a specialist BPO analyst company. NelsonHall provides buy-side and sell-side organizations with deeper research and analyses in front office, mid-office and back office BPO than any other research firm in the world. The company's subscription-based model provides subscribers with robust market analyses, case studies, vendor assessments, contract analyses, market reports and access to a content-rich BPO contracts database. The firm covers a wide range of industries including financial services, government and utilities sectors, and tracks worldwide and regional BPO activity. NelsonHall's home page is www.nelson-hall.com.

The company tracks business services activity. In particular, NelsonHall focuses on the following business services and process areas:

- Front-office document Management
- Middle office industry-specific processing services such as card processing services
- Back office support services such as HR services and finance & accounting services

NelsonHall provides information to its clients in a variety of forms, including within:

- NelsonHall's BPO subscription services, to assist organizations in identifying the most promising areas of BPO activity
- Workshops, to assist organizations in identifying the most appropriate areas of BPO for their organization
- Custom assessments, to assist buy-side organizations in benchmarking individual processes and to assist vendors in successfully taking BPO concepts to market.

For more details, contact:

U.S.:

Riverside Center
275 Grove Street
Suite 2-400
Newton MA 02466
Phone: (617) 663 5737

U.K.:

Atrium Court, The Ring
Bracknell
RG12 1BW
Phone: +44 (0)1344 393036

France:

NelsonHall
4 place Louis Armand
Tour de l'Horloge
75012 Paris
France
Phone: +33 1 72 76 26 54

rachael.stormonth@nelson-hall.com

Abstract

The purpose of this study is to provide vendors and users with a market forecast of the global Document Management services market by geography and service type.

The study complements the market assessments and analyses that are produced within NelsonHall's Document Management subscription service, and is designed for:

- ❑ Marketing, sales and business managers developing strategies to target service opportunities within the document management market
- ❑ Executives in purchasing organizations seeking an understanding of:
 - ❑ The document management services market
 - ❑ The segmentation of the document management services market
 - ❑ Vendor market shares in document management.
- ❑ Consultants advising clients on vendor selection
- ❑ Financial analysts specializing in the support services sector.

The term business process outsourcing (BPO) is defined as the outsourcing of business functions or processes. In order to qualify under this definition BPO contracts must involve the vendor taking responsibility for operational management of the business activity. For the purposes of this definition, IT services do not count as a business function.

Potential BPO activities include:

- ❑ Front-office services
 - ❑ Customer management services including billing services
 - ❑ Document management services
- ❑ Middle-office administration services
 - ❑ Industry-specific processing services e.g. card processing services
- ❑ Back-office support services
 - ❑ Finance & accounting services, including purchase-to-pay, order-to-cash, and record-to-report
 - ❑ HR Services including payroll services, HR administration services, managed recruitment services and training provision and administration
 - ❑ Services for procurement of indirect goods and services

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