

# Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

Infosource SA ● Geneva, Switzerland ● <http://www.documentimagingreport.com>

May 9, 2020

## THIS JUST IN!

### THE EXCITING FUTURE OF DIR IS HERE

Welcome to the new *Document Imaging Report*, the first one published with a different editorial team in more than 20 years. As we reported last week, Infosource, an analyst firm focused on the office automation market, has acquired the publication, and long-time *DIR* Editor and Publisher Ralph Gammon has joined Infosource as a full-time analyst. For the past three years, Gammon has worked as Infosource's Regional Manager for the Americas, primarily covering the document scanner market in North and South America.

In December, **Infosource**, which is based in Geneva, Switzerland, acquired the capture software analyst firm Harvey Spencer Associates. Gammon's experience with *DIR* covering the software market made him a natural fit to work with the former HSA principals, Mike Spang and Harvey Spencer, to flesh out Infosource's efforts in that area. However, this means Infosource needed to find a new staff to cover *DIR*.

The idea is to expand the coverage of *DIR* to incorporate more contributions from Infosource's team of worldwide analysts. Infosource has analysts that cover and visit multiple countries throughout the world and will be able to provide you with a feet-on-the-street perspective of the document automation market in those countries. For example, on the blog section of our Web site, we recently posted a piece from our Russian analyst on the effect of the precipitous drop in oil prices on the market

**CONTINUED ON PAGE 8**

## File Compression Saves Time in Telework Environments

Large, slow-to-download or upload files can hamstring worker productivity. As the COVID-19 pandemic has shifted nearly every white collar worker still lucky enough to have a job to working from home; slow, uncertain network connections and large files are a bad combination.

Most of us don't give download speeds much thought these days. After all, I can stream Peaky Blinders on my phone — everything's fast, right? Maybe. But when your seventh grader is in virtual class; your wife is having Zoom meeting with her staff, and your college sophomore is watching Tiger King, your download speed is probably going to suffer. And that's for folks able to have high-speed Internet connections. Rural communities and different cable companies around the world vary in quality. PDF compression expert **Foxit** has crunched the numbers: seconds of delay across hundreds of documents per worker, per day can lead to thousands of hours of lost productivity across the workforce.

These tiny, hidden delays can be reduced if not eliminated with better compression. *DIR* had a conversation with Kai Wille, Director of Strategic Alliances at **Foxit Software**, about this overlooked productivity killer.

### Who's Foxit?

Foxit's products focus on working with and converting documents to PDF. The company's goal is "do more with documents." Their product line ranges from a free PDF reader to conversion and compression products to a full set of developer tools to manipulate any aspect of a PDF file. The company can claim more than a billion active users with Google's Chrome and Amazon's Kindle as their customers

The core document compression technology is a combination of two vendors' product sets acquired

by Foxit: Luratech and CVISION Technologies. While the technology is slick, that's not what's important. As Wille explains, "Every company has files. Every company has employees accessing documents at home at slower speeds than they would in the office. The ability to compress PDFs for faster access is about improving business efficiency."

### ***PDF Conversion and Compression Streamlines Work Processes and More***

While our conversation was spurred by the ability of PDF compression to enable a more user-friendly work-from-home experience in a time of COVID-19, Wille outlined three broad trends where PDF conversion and compression can improve business efficiency:

- Documents are replacing paper.
- Cloud adoption continues to grow.
- EVERYONE is remote and/or mobile (a trend even before the pandemic).

During our conversation, Wille stressed that, as with any technology, the compression is a means to the end of business efficiency. He shared a few use cases and case studies to illustrate how conversion to PDF and compression helps this happen.

*Documents replace paper.* According to Wille, "50-75% of documents entering companies are an efile." These documents are a hodgepodge of quality, formats, size, etc. Challenges include an inability to search within the files, the need to maintain multiple viewers (costly and time consuming for IT staff), and slow access to large files, especially for remote workers.

Conversion and compression with PDF addresses all three challenges:

- Standardize on a single viewer, PDF
- Content is searchable
- File size reduction improves file access time

**Chase Bank** was struggling to meet mortgage processing SLAs while not being able to meet storage and backup requirements. Compression allowed the company to lower their storage costs while providing a stable format (PDF/A) to meet the needs to retain documents for up to 37 years. Employees were able to download and access documents faster to serve customers. The result: SLAs were met; 1.25 billion images were compressed over a year with direct integration into the existing workflow.

*Cloud adoption continues to grow.* No surprise here, we all love the cloud. However, an often overlooked business cost of using the cloud can crush your budget: egress fees. Cloud-based storage is generally secure and cheap. The egress fees themselves aren't huge and generally charged per kilobyte accessed. They can be unpredictable.

## **Document Imaging Report**

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*DIR* is the leading executive report on managing documents for e-business.

Areas we cover include:

1. Document Capture
2. OCR/ICR, AI and Machine Learning
3. RPA
4. ECM
5. Records Management
6. Document Output
7. BPM

*DIR* brings you the inside story behind the deals and decisions that affect your business.

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**Subscriptions:** \$597 (electronic) or \$670 (paper) per year.

For example, one of the documents mentioned in the Mueller report was stored by a Federal agency on AWS. When that portion of the report was made available to the public, that document was suddenly downloaded thousands of times. The agency blew through their cloud budget for the year in two weeks.

PDF file compression helps to mitigate this unpredictable charge. Shrink the file size, you get more egress for your cost-per-kilobyte download fee. When migrating to the cloud, smaller files are also faster. Costs go down in both directions.

Foxit consistently achieves around 50% file size reduction. Depending on the type of file, the need for fidelity, etc.; higher reductions are possible — even 99%.

*EVERYONE is remote right now.* Remote **GE** employees for the Power and Water Division were suffering slow downloads because of low bandwidth. Responsible for maintenance projects, the files these employees needed to access were large — plant floor plans, equipment maintenance logs, etc. Foxit standardized the files to PDF and achieved 45% file reduction. File open times dropped from 4-5 minutes per document to under 30 seconds.

No one likes to wait for documents. For businesses, those seconds (or minutes) of lost productivity add up to a serious drag on efficiency over time.

**Partners Wanted**

Foxit is actively looking to create additional partnerships like the ones with OpenText and scanner manufacturers **ibml** and **Panasonic**. While PDF conversion and compression is not a sexy topic, the benefits are — lower storage and cloud retrieval (egress) costs; consistent, searchable documents across an organization; and reduced liability risk. To add another element of business efficiency to your solution; contact Kai Wille for more details: [kai@foxitsoftware.com](mailto:kai@foxitsoftware.com) or +1 408-386-9679.

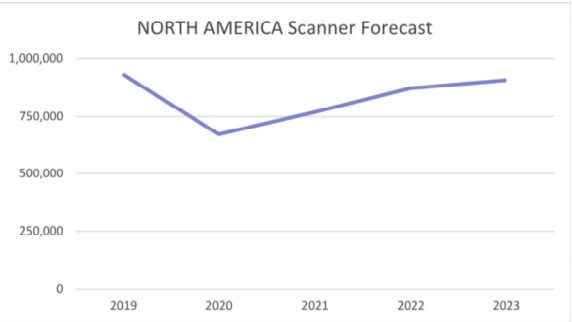
**Limited Time Free License**

To allow companies to get a taste of the value of compression and help businesses perform better in today’s unexpected or planned for work-from-home environment, Foxit is offering a free license through June 30. The page limited license will be enough for many companies to experience the benefits of compression as we all muddle through these difficult days. Contact Wille for more details.

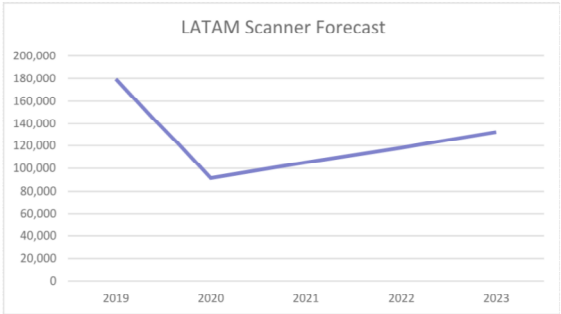
# How COVID-19 is Affecting Scanner, Software Forecasts

The COVID-19 pandemic has unleashed major changes to the way that business is being conducted. One result will be to “turbocharge” the transformation to a digital economy, which will have a direct impact on shipments of office equipment and supporting software.

Infosource has released two forecasts in the last two weeks to reflect the fundamental changes occurring in the scanner, MFP/printer, and Capture Software markets.



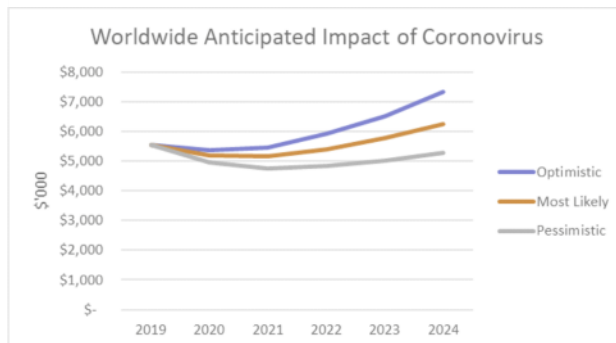
In the document scanner market in North America, Infosource has forecast a unit-based CAGR of -0.75% between 2019 and 2023 (see chart). Ralph Gammon, lead analyst for the Americas, said this reflects immediate stress in the market due to quarantine conditions, as well as both a short and long-term reduction in paper processes. That said, there should be some bounce back starting in 2021, driven by implementation of delayed projects, the natural cycle of upgrades, and installation of distributed scanners for trailing paper related to the increased number of digital processes.



The decline in Latin America is projected to be much more pronounced over the next four years

at a negative CAGR of 7.26%. Gammon sees several countries in Latin America suffering economically as well as politically, which he expects will negatively affect the region for several years to come.

In EMEA, Western Europe shows a similar direction to North America, but the overall market is being pulled down by the Mid-East and Africa, as well as Eastern and Russia/CIS. Mark Nicholson, lead analyst for scanners in EMEA, stated that while clearly paper-based processes are in decline, he does not expect as much volatility as in the Americas.



In the Capture Software market, the Worldwide forecast has been greatly reduced from HSA/Infosource's original optimistic forecast of a greater than a 15% CAGR through 2024 to a "most likely" scenario estimate of a 2.48% CAGR through 2024 and an optimistic outlook of a 5.77% CAGR, with North America forecast at a "most likely" CAGR of 4.22% an optimistic CAGR of 8.22%. This reflects the hope for a fairly fast turnaround in the world's biggest economy.

EMEA's turnaround is projected as somewhat less, with a 2.47% optimistic CAGR forecast and a -0.36% CAGR forecast as most likely. Infosource lead analyst for Capture Software, Harvey Spencer, says that the market, in particular services-based Capture 2.0, has some big opportunities from the accelerated move to digital. In the scanning area, end users want to truncate any paper to digital images while adding relevant metadata as fast as possible. In the move to remote services and immediacy that is demanded by users, Capture Software provides the services that can manage, interpret, and provide understanding for the interactions.

For more information: [query@infosource.ch](mailto:query@infosource.ch).

## Accelerated Change and Hyperautomation

**Kofax** has been steadily building an intelligent automation platform (IA) for at least the previous two years. In previous conversations, Chris Huff, Chief Strategy Officer, has outlined Kofax's dual goals of protecting its existing capture business revenue (Nuance and Top Image Systems acquisitions were part of this) and leveraging Kofax's legacy portfolio to build towards the future of automation.

Last year, Huff told *D/R* that before joining Kofax, he had sat down with Kofax CEO Reynolds Bish and proposed the idea of building a platform of automation capabilities with complete interoperability. Bish had said **Thoma Bravo** [the firm that now owns Kofax] had been on his back to do something similar. Turning that concept into reality has been Huff's focus since.



Dan Kuenzig, Vice President, Strategy at Kofax

In a conversation at the AIIM Conference with Dan Kuenzig, Vice President, Strategy, at Kofax, he placed these efforts into context.

Everyone reading this knows that a key driver to technology purchases is the need to move faster. As Kuenzig put it, "Every industry around the world is struggling with accelerated change. Things move faster and faster as innovation and the Internet create sheer speed."

Of course, where there is change, there is opportunity. "All of these emerging technologies, like blockchain, are going to open up new customer experiences, add more organization capacity, as well as create new business models," Kuenzig said. "There are three customer journeys or personas in the automation world that Kofax customers, the market, and, increasingly, analysts are talking about."

Kuenzig views these journeys as a continuum, from point solutions to an integrated architecture that will enable the concept of hyperautomation. Kofax RPA tools play a role in each journey as an entry to automation and then as a key component of a complete intelligent automation platform.

■ Journey 1 is getting started. It's automating a single process, like AP. Sometimes this is business-led and evolves into shadow IT. An example of a tool to support this journey would be a trial license for RPA. RPA is brought in and is focused on task repetition. Price is important at this level.

■ Journey 2 is about bringing IT into the mix and using complementary technology to work with RPA. Here, a business is integrating RPA and capture tools with Kofax so a third-party integrator isn't needed. Companies here begin to realize that RPA is a bigger buying decision than they initially thought (thankfully, this perception is beginning to change as vendors and the analyst community reinforce the idea that capture, RPA, and digital process transformation are all parts of a whole). As Kuenzig points out, according to Gartner, "RPA derives 80% of the value by complementary tech."

■ Journey 3 is hyperautomation, which is where Kuenzig believes things get interesting even though it's only a small piece of the market. This is where Kofax is heading, creating an integrated stack so an organization doesn't have to "figure out how to piece it together to make it work."

### ***Hyperautomation and Kofax***

Gartner's number one trend for 2020 is hyperautomation. In Kuenzig's words, "Whatever can be automated will be automated using a multitude of tools. It's a goal AND a mindset. Automating tasks only changes organizational capacity. To transform a business, you need a complete set of tools to automate as many processes as possible with as many stakeholders as possible."

Hyperautomation is transforming a business for customer experience, expanding organization capacity, and creating new business models. For example, a Kofax banking customer in South America had the goal of bringing in "unbanked" customers. These are people outside of traditional banking. They realized that only 30% of potential customers made it through onboarding. They changed their entire process and went to the communities (because people couldn't get to banks during normal hours and didn't have Internet connections) with iPads and documents and onboarding went up to 50%. That's an entirely new source of revenue by reenvisioning the customer experience.

As everyone knows, 80% of data is unstructured and RPA deals with structured data. You need capture and AI so that organizations can access and use 100% of their information. Kofax's product range is strategically positioned to help organizations move from Journey 1 through to Journey 3—hyperautomation.

Kofax probably won't lead with hyperautomation. After all, it's a lot to handle for organizations. The goal is make customers aware of the possibilities, so that they can make smart buying and implementation decisions as they start their journeys, so the technology transition is easier along the way.

### ***Why Embedded RPA Is Important***

AI skill sets are in short supply. Part of Kofax's strategy is to "make a more consumable business outcome without having AI experience." Kofax has been investing in AI for a long time, not just in the last three years when it's gotten hot. For embedded AI, Kofax has dozens of patented algorithms. RPA is essential to hyperautomation, but not sufficient on its own. It's Kofax entire platform, including capture, BPM and other elements that are designed to give it a leg up in this emerging market space.

For more information:

<https://bit.ly/KofaxIAHyperAutomation>

## **Implementing Compliance Rules From the Cloud**

Governance Rules as a Service (GRaaS), a collaboration between **Hyland Software** and **Iron Mountain** announced at last year's CommunityLIVE conference [see [DIR 9/21/19](#)], provides OnBase customers a way to apply the most current regulations to their business documents for compliance and records management retention.

*DIR* caught up with Tim Tallaksen, Director, RPA Sales, and Tori Ballantine, Product Marketing Lead for Hyland Cloud & ShareBase, at the AllIM Conference in March, *DIR*'s last outing, to talk about the benefits of GRaaS.

OK, let's get the obvious out of the way: Hyland is selling GRaaS. We did laugh a tad. For the record, they made the joke first.

## ***GRaaS: The Basics***

The solution is offered as a cloud service. It is an integration of Hyland's OnBase ECM with Iron Mountain's Policy Center cloud-based policy platform and offers a way out of the too-common digital hoarding trap.

It is being sold as an all-inclusive service for OnBase customers. Hyland built the integration into the repository so that the service is seamless. It is available now.

With the Policy Center integration, OnBase customers can apply retention rules to any piece of content. The challenging piece is keeping track of the multitude of constantly changing regulations globally, nationally, and locally. That's where Policy Center comes in. Note that Policy Center is an Iron Mountain product and available to anyone. The unique twist here is the integration work Hyland has done to make using it seamless within OnBase.

### ***Confidence That the Rules Are Right***

As Ballantine points out, "We saw the need and wanted to partner with best-in-class. Everyone feels better when international attorneys vet the rules — a full army of them."

Iron Mountain has a full team of international attorneys constantly updating the Policy Center rules. One of the challenges is the fear of getting the retention rules wrong, a challenge both Tallaksen and Ballantine have heard from their customer base and from attendees at the AIIM Conference, "so much content, so much fear about content, and not knowing where and how to start."

### ***Who Is This For?***

Nearly every company stores more content than they need or should. As Tallaksen put it, "It's applicable for 100% of our customers. They've been storing content year after year, some for decades and many of them always have said our future project is to put some retention rules around the content. But that next year project is always easy to put off. This gives them the confidence to do that project now and the confidence that they're doing it right. That's always been one of the hardest things to overcome, who wants to sign off on that project internally?"

As mentioned above, that "army of lawyers" gives Policy Center customers the confidence that they are applying the right rules to the right content.

Tallaksen pointed out a few other nuance's for the product that help make life easier for companies attempting to get a grip on their digital content hoard:

- Rules can be applied retroactively to documents, which is huge too because who wants to go back manually through the docs from 10 years ago and attempt to identify which rule applies?

- Many records are impacted by different requirements simultaneously. So you have to figure out which rule applies longest, you don't want to delete too soon. If this document is stored here and it impacts a customer in the UK, there's a whole set of overlapping rules that

## ***HYLAND DELIVERS ON ITS FOUNDATION STRATEGY***

Last year at **Hyland's** CommunityLIVE event in Cleveland, *DIR* discussed the company's steady shift to the cloud via its Hyland Experience and just-announced Foundation versioning strategy. While the Hyland Experience platform will be a true multi-tenant cloud platform; the Foundation strategy goal is to bring the concept of the cloud's frequent product updates to on premises and hybrid versions of Hyland products. The overall goal is to encourage customers to embrace the cloud without forcing them to do so.

To that end, on April 23, Hyland released the latest versions of two products, OnBase Foundation Enhancement Pack 3 (EP3) and Content Composer Foundation EP1.

The developments to the latest version of OnBase Foundation include:

- New Accounts Payable solution offerings: Greater control over the procure-to-pay lifecycle, new capabilities for Infor Cloudsuite Financials for PO and non-PO posting; and Brainware integrations for automated data capture.

- Compliance enhancements: New functionality with Governance Rules as a Service and new reporting capabilities within OnBase's policy and procedure administration solution.

- More integrations and UI enhancements.

The Content Composer Foundation EP1 release includes:

- A more intuitive and flexible Web UX. New REST APIs.

- More integration options for content management when integrated with OnBase, including the ability to archive communications created in Content Composer directly into OnBase.

As **Ed McQuiston**, EVP and Chief Commercial Officer, Hyland Software, shared with us then, "We are working to shift the perception of Hyland from the idea that we are just an archive." To *DIR*, this looks like a firm step forward towards making that shift in perception a reality.

need to be sorted out.

Ballantine touched on the risk aspect of storing too much data, “we hear a lot about the concept of digital hoarding. Better safe than sorry, I’m just going to keep everything because storage is cheap. And that was fine for a while, it was risky but it wasn’t necessarily a monetary risk but now legally you cannot keep people’s documents indefinitely or you’re open to monetary risk. So we really wanted to give our customers a way to move beyond the mentality of let’s keep it just because and have an intentional relationship with their content.”

Lurking behind this regulatory risk is also a cybersecurity risk. Cybercriminals are attempting to hack everyone’s information as I type this. For lazy cybercriminals, there are even ransomware-as-a-service kits available on the dark web (not a joke). Documents that are stored but aren’t needed simply create a larger target-rich environment for ransomware and hacking in the event of a data breach. Eliminating unneeded documents decreases this risk.

### ***How’s GRaaS Work?***

Basically, you match the appropriate retention rule from Policy Center to the documents/records types you’re archiving in your OnBase system. It is configurable for each company and is available internationally.

Companies can also override the default policy during configuration. Per Ballantine, “Say you have a particular requirement that the government says destroy this document after two years, but your internal policy is to keep for two years and two months. You have ownership of your policies.”

For more information:

<https://www.hyland.com/en/learn/it-programs/graas-solution-overview>

### ***BRIEFLY***

#### ***ALARIS HOLDS VIRTUAL PARTNER EVENT***

With COVID-19-related restrictions on travel having pretty much wiped out in-person conferences for the foreseeable future, business events, much like happy hours (admittedly the two sometimes get crossed), are being held virtually through online meeting applications.

**Alaris** had been scheduled to hold its annual EMEA conference in Vienna in April but ended up hosting more than 200 partners online.

Alaris President and General Manager Don Lofstrom shared with partners that despite some supply chain challenges created by the effects of the pandemic in China, like most hardware vendors we’ve spoken with, Alaris had a strong fiscal year, which ended on March 31. “Our supply chain is now intact and strong, our manufacturing sites in China are up and running at nearly full capacity,” he said. “Scanner production is over 95 percent capacity now, compared with 40 percent in March. Our secondary supply chain partners are also beginning to normalize, although we continue to monitor this very carefully in certain regions.”

Lofstrom noted that the increased number of people working from home brought about increased demand for the vendor’s products and services in April. “We expect some short-term decline for most applications as a result of the crisis but are confident that there will be some pockets of incremental demand,” he said. “The need to share documents across remote teams and accurately capture data and automate business processes will remain critical, with many organizations under pressure to remove manual steps and reduce staff time.”

As far as roadmap goes, Lofstrom revealed that Alaris plans to release an updated series of low-volume production scanners this summer.

For more information:

<https://bit.ly/AlarisVirtualSummit>

#### ***UiPath and Deloitte delivering intelligent capture***

This week, **Deloitte** and **UiPath** announced they are working together to deliver the new Deloitte Intelligent Document Processing (DIDP) capture solution. DIDP can be installed in premises or in the cloud and it leverages **ABBYY FlexiCapture** technology. One early user is **DHL Supply** chain, which is using DIDP for invoice processing.

For more information:

<https://bit.ly/DeloitteUiPathCapture>

#### ***Brother reselling Kofax ControlSuite***

**Brother** and **Kofax** recently announced a partnership through which Brother will resell an embedded version of Kofax’s ControlSuite on select printers and MFD devices. ControlSuite is the integrated combination of document scanning, print management and document security software that Kofax picked up when it acquired Nuance [see [DIR 5/3/19](#)]. Brother has

trained dedicated sales and technical pre-sales teams on ControlSuite, which it is making available this quarter.

For more information:

<https://www.documentimagingreport.com/?p=6816>

### **ABBYY Appoints new Chairman**

Noted tech executive Robert Youngjohns has been appointed as **ABBYY's** new Chairman of the board. Youngjohns, who is based in the San Francisco Bay area, is an operating executive at **Marlin Equity Partners** and sits on multiple boards of high-tech companies. Last year, he spent time as an interim Chief Commercial Office at **Automation Anywhere** and before that spent over four years at **HP** where "he was instrumental in the \$9 billion merger of HPE's Software Business Segment with Micro Focus." Youngjohns was also president of Microsoft North America.

He takes over for ABBYY founder David Yang, who will remain on the board but has stepped down as Chairman to focus more on newer ventures.

For more information:

<https://www.documentimagingreport.com/?p=6851>

### **NEW DIR FROM PAGE 1**

for document scanners. This is the type of coverage you can expect to see more of in *DIR*.

In addition, we plan to continue to provide you with the top notch journalism you've come to expect. To lead this effort, we've brought on board Bryant Duhon as editor-in-chief. Many of you may remember Bryant from the 20 years he spent at ALLM as editor of various publications. "With ALLM, I covered many of the same companies and technologies that *DIR* has so ably covered over years," said Duhon, who has spent the past few years focused on developing and implementing content marketing strategies. "Since starting with *DIR*, I have found myself half-jokingly invoking Al Pacino's famous line from the *Godfather III*: 'Just when I thought I was out, they pull me back in.' Seriously, I am pleased to return to this industry and build on *DIR's* legacy. Please don't hesitate to reach out to me with a hello or an idea."

Fiona Macbeth has also been brought on board as managing editor of *DIR*. Macbeth, who is based in the U.K., has been an analyst with Infosource for nine years, specializing in the

MFP and printer markets in EMEA. Previously, she worked with the market intelligence organization, epMI, where she was involved with multiple aspects of consultancy work, including its monthly PrintView publication. Fiona will help give *DIR* a more international flavor and will be in charge of marshaling Infosource's considerable resources toward the publishing and improvement of *DIR*.

"I am excited to join the team on *DIR* and look forward to the opportunity to broaden our scope and coverage as we move forward, providing analysis and insight to our clients in these challenging times and beyond," said Macbeth.

Gammon is excited both about his new career and the prospects for *DIR's* growth. "Working with *DIR*, first as an editor, starting in 1998, and then adding publishing responsibilities when I purchased the publication in 2002, has been a great opportunity and experience for me," he said. "I came into this market not knowing the difference between OCR and document scanning and really appreciate all the friends and colleagues I have worked with over the years and who helped me grow to the point where I feel comfortable taking on an analyst role going forward.

"As for *DIR*, I really feel it is now at an inflection point. It was more than 10 years ago that I remember talking to Michael Bida, who at the time was retiring after a long career with Kodak where he earned the informal title of 'the Father of Document Imaging.' I'll never forget Michael suggesting that the multiple parties covering the market at the time, myself with *DIR*, Susan Moyses, who was tracking scanner sales, and Harvey, who was building HSA capture software analyst service, get together to form some sort of super market-coverage firm. I never forgot his idea, and in 2020 Infosource has finally made this vision a reality.

"I am looking forward to continuing to work with many of you in my new capacity as a senior analyst for Infosource, a position from which I will also be contributing articles to *DIR*. *DIR*, will now, of course, be more than just me, and the expanded resources should help it grow and evolve into something you will find even more valuable as we all move forward."

For more information:

<https://www.documentimagingreport.com/?p=6879h>  
<https://www.documentimagingreport.com/?p=6868>