

# Document Imaging Report

Business Trends on Converting Paper Processes to Electronic Format

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

October 9, 2020

## EDITOR'S NOTE

### NORMAL

I don't know about you, but I'm sick of hearing "the new normal" being bandied about related to how things have/are changing because of the pandemic. Maybe that's why I was taken with **Hyland** Exec VP and Chief Commercial Officer Ed McQuiston's comment about "the next normal" in the opening Hyland CommunityLIVE keynote this past Wednesday.

Whatever "normal" is today, will be different a year from now, a month from now, or even tomorrow. We're always living in a "new normal."

There is no unchanged "normal" as culture, technology, and we ourselves are ever evolving. As things change, we adapt to accommodate those changes by (hopefully) wearing a mask, avoiding crowds, and social distancing to help deal with the pandemic.

Of course, the pandemic has forced massive change in a short period of time and people are desperately trying to make sense of it, but, historically, that's normal. Humans have experienced plagues since

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## Capture Services, RPA Drive Double-Digit Capture Growth

Driven by strong adoption of Cloud Capture Services and RPA, the Capture Software market grew by 16.5% in 2019 to reach \$5.5 billion worldwide measured in end-user revenue. These and other findings were recently published in **Infosource's** annual report on the Capture industry.

The report includes a market forecast through 2024, which projects a 2.4% five-year CAGR, significantly reduced from the forecast issued a year ago.

"Obviously, the COVID-19 pandemic is having a negative effect on the economy," said Ralph Gammon, a senior analyst at Infosource Software and author of this year's report. "While in some cases the pandemic is driving Capture adoption as business and government organizations look to digitize processes to enable remote workforces and reduce risks related to personal interaction, overall there is going to be less money spent on IT improvements. While we expect vertical markets like government, service bureaus/outsourcing, healthcare, and higher education to be strong in the immediate future, overall, we expect spending on Capture to decline through the first half of 2021. Then, after a vaccine has been distributed, and things have started to return to normal, spending will start to pick back up again, across all verticals."

Infosource is particularly bullish on Cloud Capture Services. In 2019, this segment of the market grew by 32% in 2019 to make up 10% of total revenue. This is up from 4% in 2016. "We expect the pandemic to further accelerate adoption of Cloud Capture Services," said Gammon. "A cloud platform can provide the increased flexibility that businesses crave in times of uncertainty."

Cloud Capture Services are also a key element in Capture 2.0, which Infosource views as the next

generation of the market. Capture 2.0 encompasses multi-channel inputs, including paper, PDFs, and electronic data, as well as elements like JPEG images, voice, and video.

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## Capture 2020: European Edition

On November 5, Infosource will be bringing the virtual roundtable concept that was so successful in the US to Europe.

Currently, two sessions are scheduled at 10 and 3 central European time (we will schedule more to accommodate over-flow demand as needed).

Our September roundtable participants enjoyed them:

"Very much enjoyed yesterday's Round Table, Harvey - definitely recommend to others in our industry to join your next one." Dir US Sales, European Capture Software Company

"So much fun and very informative on the Future of Digital Transformation. Our discussion went into many areas around the capture software market but it was much broader than I've experienced before. Very important to plan for the future!" President, Scanner Software Cloud Tools

"Great to collaborate with others yesterday. I know I needed some new ideas." VP Marketing, DM Software Company

The sessions will begin with an overview of the just-released Capture Software report. The majority of each hour-long virtual roundtable will consist of a robust Q&A session, moderated by Harvey Spencer, VP of Infosource. Think of Mr. Spencer as the high school teacher who called on everyone – be ready!

The conversations will differ, but, like with the in-person events, we look forward to learning from each other, particularly around the impact of the pandemic on our businesses and opportunities. Is it turbo-charging the capture industry? Quite possibly.

As a reminder, while we enjoyed the US virtual roundtables and are looking forward to these, we can't wait for the Capture Conference to return as an in-person event on September 8-9, 2021 just outside Chicago (fingers crossed).

Note: You don't have to be in Europe to participate, join us wherever you are on the globe. We look forward to seeing you on November 5. For more information: <https://www.hsassocs.com/capture/why-attend/>

## 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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# COVID-19: Good for the Capture Business

I felt a bit queasy typing that title, however, it does increasingly look to be true.

I took the reins from Ralph just around the time when the pandemic was taking hold here and around the world. Many initial conversations went something like this:

Me: "Do you think this is going to be good for business?"

Industry Person: "Probably."

Now that we're entering the 8th month of the pandemic, the answer looks like it's a solid "yes." You all know that access to content, wherever the content is and wherever someone works, is essential for business and many of you provide those technologies. So let's go straight to collection of data points that all point to a massive acceleration of "digital transformation" (1), much of which will be enabled by capture and content services technologies.

## 97% of Enterprises Accelerated Digital Transformation Efforts

Research sponsored by **Twilio** (a cloud communications and customer engagement platform provider) is the source for this statistic. Two other stats interesting for this industry:

- 95% of all companies are seeking new ways of engaging customers as a result of COVID-19

- 92% say transforming digital communications is extremely or very critical to address current business challenges

While the focus of the research is on communication, given that achieving both of those objectives above relies in large part on documents and information, the opportunity for the vendors in this space seems massive.

**Gartner** projected an overall global decrease of 7.3% in IT spending in 2020 in July, slightly better than the 8% predicted in May. Within the overall decrease, they predict infrastructure-as-a-service to grow 13.5% to \$50.4 billion in 2020 and overall cloud spending to reach \$257 billion in 2020 compared to \$242 billion in 2019, with continued growth in 2021 and 2022.

Gartner also projects the pandemic will increase demand for RPA – from \$1.4 billion in 2019; \$1.58 billion in 2020; \$1.9 billion in 2021.

## Capture Hardware and Software

**InfoSource** research also has shown an uptick in hardware and software sales focused on enabling work-from-home and digital transformation efforts. Read Ralph Gammon's article on page 1 (if you skipped it!) and see Barbara Richard's, Senior Analyst, InfoSource, article in DIR 9/18/20.

In June, I spoke with Jim Roberts, President of **DocuWare**, who noted a huge jump in interest in their products based on marketing and Web stats [See DIR 6/19/20 for more]. The company recently shared a press release that put numbers to this, "Since March of this year, workforces have gone remote and demand for document management solutions soared. DocuWare grew their number of new cloud customers by 24.3 percent compared to the same April to August period in 2019."



Jim Roberts, President, DocuWare Corp.

I did a quick search to look for available financials around the industry. **OpenText** stood out with a 37.5% increase in their cloud services and subscription revenue (\$241.9 to \$332.6 million) in 4Q19 compared to 4Q20 - their FY ended June 30, 2020. While not specifically stated in their release, some of that growth has to be attributed to pandemic spending.

During **Fujitsu's** Mid-Year Channel Update, the company noted their commercial scanner sales are above pre-pandemic levels, led by their ScanSnap line.

While obviously not definitive, taken together a picture does begin to emerge of digital transformation actually happening in a "Big Bang." I know that during my time at AIIM, getting attention for all of the technology "stuff" that comprises the industry felt like Sisyphus rolling his boulder uphill, but never getting over the top. Maybe we're starting to glimpse the other side of that hill.

I also reached out to a few folks for their thoughts. I couldn't get to everyone, so if you'd like to share your thoughts, I'd love to hear them, [bduhon@documentimagingreport.com](mailto:bduhon@documentimagingreport.com).

David Jones, VP of Marketing, **AODocs**: Covid-19 has had a completely polarizing effect on



David Jones, VP of Marketing, AODocs

business as some industries (retail for example) have delayed projects for financial reasons. Others see the situation as an opportunity to push through projects that in the past have not necessarily had the backing of senior leadership. Now forced to

work from home, those same leaders are now realizing how vital instant, remote access to content, workflows, and collaboration are to an organization.

These organizations are pushing projects of increasing complexity forward at a greater pace – starting with simple deployments to purely get things up and running, but progressively moving beyond this to projects that deliver significant benefits. Specific areas where we have seen this in action include:

- An acceleration of paperless use cases (e-signature and other validation workflows)
- Entirely new use cases such as telehealth
- A realization from customers that cloud collaboration platforms are a game-changer, and, by extension, products like AODocs which are built on cloud collaboration platforms are an agile, low-risk route to delivering this to their organization

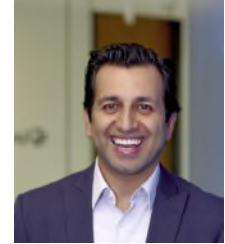
Christina Robbins, **Digittech**, Marketing Manager: "The rapid shift to remote work caused by the COVID-19 pandemic shined a bright light on problems with remote data security and document sharing and collaboration for many organizations, and they're scrambling to get solutions implemented before the end of the year. For us, this has meant that despite an initial slowdown in new sales opportunities in the spring, we've seen strong interest in our capture, cloud, and ECM products ramping back up through the summer and fall. The analysts agree that 2020 should end well for our industry:

- Aragon Research explains that we will see spending on collaboration, communication, and content management increase 300% in 2021.
- Technavio revised their market estimate for the worldwide Enterprise Information Management market upward just last month, noting a growth rate of 19% per year continuing through 2024. And it's above 19% in 2020.

Jim Roberts, DocuWare President: "DocuWare is seeing increased demand in the marketplace

that did not exist prior to the pandemic. Businesses of every size needed to quickly digitize so that remote work forces could maintain core business processes. We consider ourselves very fortunate to be in a position to help and to educate. In April the Business Continuity and Mobile Workforce Webinar series we launched was our most popular series ever! We had more registrants in that 2-month time period than we do in a whole (normal) year."

Ike Kavvas, founder and CEO, **Ephesoft**: "With COVID-19 and the economic shakeup, we've seen an even greater demand for digital transformation and automation. More enterprises are realizing that ROI on digital transformation can be seen immediately and long term: these initiatives expedite business processes, significantly reduce expenses, and, as a result, enterprises are able to better serve their customers. We've made adjustments to our own business as a result of the pandemic and exceeded revenue goals due to demand for intelligent document processing and automation."



Ike Kavvas, Founder and CEO, Ephesoft

(1) Personally, I despise the phrase "digital transformation" as it's so broad as to be essentially meaningless -- moving from a typewriter to word processing is digital transformation. However, it is useful shorthand, so, sigh, using it.

For more information: COVID-19 Digital Engagement Report, [http://bit.ly/Twilio\\_report](http://bit.ly/Twilio_report)  
Gartner IT spend: <https://bit.ly/GartnerITspend2>

## New Remote Scanner Management/Monitoring from Kodak Alaris

**Kodak Alaris** has released three scanner remote monitoring and management service offerings:

- MPS Capture Agent: allows developers to add Kodak Alaris scanners to existing managed print services dashboards for visibility into scanner operational data
- Scanner Manager: a cloud-based solution geared to creating a dashboard for monitoring scanner operational data, deliver usage reports, and manage user alerts

■ **Scanner Finder Tool:** delivers an inventory for a “capture system assessment” by discovering USB-connected scanners on a network; works with Kodak Alaris equipment and scanners from other vendors too

Managing print fleets comprised of printers and/or MFPs is a common service. Kodak Alaris believes the addition of scanners to remote monitoring is unique to them (Note: Please contact us if you know of a similar solution; [bduhon@documentimagingreport.com](mailto:bduhon@documentimagingreport.com)). Now companies will be able to monitor their capture infrastructure similar to their printer fleets.

To explore this new offering, we interviewed Jeffrey Moore, Service Operations Manager, Alaris, a Kodak Alaris business.

The benefits of tracking equipment are obvious -- controlled costs, monitoring for usage for proactive maintenance, etc. MPS adds an additional security level with the ability to track usage down to the individual user level via verification at the device (card reader, biometrics, password). As of now, you can't track who is manning a scanner. Regarding the other benefits, Moore mentioned:

■ Proactively address productivity impacting situations driving increased productivity

★ Proactively identify and address scanner issues that impact your productivity via real-time customizable alerts

★ Consumable management

★ Driver version management

★ Management as a service – Kodak Alaris can manage your fleet on your behalf

■ Lifecycle Management

★ Usage data allows you to increase your knowledge of the environment

★ Allow for balancing of workload

★ Understand current scanning needs and future hardware demands

■ Assessing and optimizing your scanners allows you to upgrade hardware and services.

■ Increased customer intimacy

★ Usage data for scanners from Kodak Alaris allows us and our Partners to offer Lifecycle Management and Capture Optimization

**Q:** Any Kodak Alaris scanner?

**Moore:** Any Kodak scanners that are connected via a USB port.

**Q:** Who is the idea market? Copier dealers/service market or in-house IT struggling

to manage all the hardware?

**Moore:** The target market would be end users with mission critical or large quantities (30 or more) of Alaris scanners or organizations that wish to receive some form of managed service for their capture devices. Along with resellers that might have their own scan bureaus and/or a desire to help manage their customers' fleets.

**Q:** Does the Scanner Management connect to existing dashboards or is it an independent solution?

**Moore:** Scanner Manager is an independent solution in and of itself. Scanner Manager consists of a cloud application (Dashboard) and a collector (KA Collector) that is deployed to each host PC to which an Alaris scanner is attached. Scanner Management does not connect to an MPS solution

**Q:** Can the Scanner Finder tool find any USB-connected scanner, Kodak or otherwise?

**Moore:** The Scanner Finder Tool will find all Kodak Alaris scanners that are connected via a USB port and powered on. We haven't tested every model from other manufacturers. However, we have tested specific models from other manufacturers and we have been successful in reporting back on them.

**Q:** Is this a one-time scan or would it detect someone bringing in an "illegal" scanner after the initial scan and using it for personal use?

**Moore:** While the collector would pull the logs from the new scanner and forward it to the dashboard, we would not have associated the new scanner to the account so the customer would not be able to see it.

For more information:

<http://bit.ly/KodakAlarisRemoteSolutions>

## UiPath and Kodak Alaris' Global Alliance

On August 21, **Kodak Alaris** announced a global alliance with **UiPath** which will allow each company's channel partners and customers to leverage the other's software and solutions. At the same time, the companies introduced the Alaris Capture Pro to UiPath Orchestrator Connector, which provides a connection between UiPath bots and images from Kodak scanners.



*DIR* sat down with Alaris division of Kodak Alaris' Vanilda Grando, Director Global Sales Development, and Sue Rodeman, Global Marketing Director.



Vanilda Grando, Director  
Global Sales Development  
Kodak Alaris

Grando notes that Kodak Alaris decided to work with UiPath because "we always look to go with complementary solutions and they already had a good relationship with UiPath." The companies also complement each other in vertical markets and can help each other to expand geographically.

It does boil down to the customer, says Grando, "with the large increases in automation requirements, together we can provide a really good automation experience for common customers as well as find new ones together."

The companies are both strong in government and financial services – and are seeing higher than usual demand in both the logistics and healthcare industries. Grando also noted call centers are increasingly looking for automation.



Sue Rodeman, Global  
Marketing Director, Kodak  
Alaris

Rodeman picks up on the complementary nature of the companies and target markets, "I think the real reason those are so important is that they are industries where investing in automation and digital transformation is critical for them to be able to

grow and be agile. Both UiPath and us focus much of our energy on this strategic imperative and for these industries."

### ***The COVID Effect***

Much like everyone else, both Rodeman and Grando see growth opportunities for this industry from the pandemic. There are huge areas of needs for automation for processes like unemployment, job applications, etc. Says Rodeman, "We've definitely seen some increased demand, auto loans and small business loans are two examples. Our solutions play very well in pockets of industry where we traditionally have a good presence and we've seen increased demand."

### ***Focus on the End User***

One of the reasons Kodak was comfortable with UiPath is the mutual focus on the customer.

Grando pointed out that the companies are sharing experiences and knowledge with each other as they work with customers to generate demand and understand customer needs. They are working together to identify new opportunities, especially for customers that really need to stop paper processes.

### ***The Story of Bob***

Image quality is always crucial in any automation effort. Both Grando and Rodeman emphasized that this is a great thing about this collaboration as it plays to the strength of both companies -- superior image capture quality from Alaris and top-notch RPA from UiPath. When asked how they are trying to get the esoteric idea of information quality across to end users, they pointed out that Kodak Alaris and UiPath have been jointly working on webinars and other marketing efforts.

To illustrate the importance of image capture quality – an Alaris Perfect Page Technology strength – they shared an example of poor image quality of a customer name "Bob." If the original capture of the customer form is poor and the "B" is read as an "8", this quickly proliferates across different apps. When Bob calls in to ask a question about an invoice, customer service reps can't find his account and Bob isn't happy.

It's an over-simplified example, but one they both said does a good job of quickly getting the point across that clean, accurate document capture is essential to the start of RPA.

Grando noted joint opportunities around the world, such as Mexico and Chile in South/Central America and Southeast Asia as well as early stage efforts in Europe.

For more information:

<http://bit.ly/KodakAlarisUiPath>

## **Capture, Virtual Roundtables, and the Industry**

I sat down with Michael Spang, Director of Research - Software for **InfoSource**, after the conclusion of the first round of virtual roundtables, and he shared some nuggets from these events. I can't share everything (you need to sign up for the European Virtual Roundtables on November 5 for that!), but here are some insights and off-the-cuff observations from my conversation with Spang.

Much like you'll see elsewhere in this issue, COVID-19 has ripped the blindfold off of a lot of businesses who realize they need access to their information.

As Spang noted, "In the capture market, things haven't dropped off as much as expected. Maybe not a great 3rd and 4th quarter, but better times ahead in 2021. Obviously if you're an MFP manufacturer, there's no one in the office, but if you're trying to enable this new work environment, you're in good shape."

The first phase of having blinders removed is just gaining access to information, scanning documents, capturing digital documents, and then making them available. As the need to digitize continues, we'll begin entering a second phase of "how to deal with a permanently-changed work environment. HR onboarding, mobile apps – changes are going to advance the entire automation market."

Regarding RPA, Infosource includes this technology in the context of reducing keystrokes (though obviously RPA could crossover into automation market reports as well).

They are a little more down on RPA than other analysts. Spang explains, "There are the big three and then larger companies, Microsoft, IBM, and others, are picking off RPA companies. They're taking RPA and see the need for it and embedding it into their platforms. It becomes a feature and buried within there, which makes it much harder to tease out, of course."



**Mike Spang, Director of Research, Software, Infosource**

As RPA becomes more associated with workflows and business processes

[something Bob Fresneda, President, US Operations, TCG Process also mentioned in *D/R* 8/28/20] they might not even be called RPA in five years – digital workforce enablement companies maybe?

Services and the cloud are going to continue to evolve regarding capture. Spang pointed out two of the larger vendors making pushes here are OpenText and IBM. He thinks IBM is doing a good job of packaging various services in their Cloud Paks, especially from a marketing angle. Says Spang, "They are easy to consume and the same pricing model applies for on prem, hybrid, or in the cloud. While I'm not sure of all the

technical details, it's an easy to understand package."

Spang also mentioned a conversation with Appian, which is a workflow/process automation company. "They realized they needed capture and invested in promoting Google Cloud applications for capture. This allows them to move into that market very quickly as a workflow company. They're smart enough to know that Google and AWS and whatever MS comes up with are going to be the Wal-Mart of capture apps and be commoditized fairly quickly. There's not going to be a huge revenue there, but there are opportunities for adding service and more complex capture technology for more complicated business problems."

Capture is on its way to becoming table stakes, from a technology standpoint. The revenue will be on the process side. I think of this in the context of the HubSpot marketing platform. It's there and anyone can use it, but using it effectively and bringing best marketing practices to bear isn't easy.

There's a lot of opportunity here for a service model and providing value. Many existing service providers can embrace this, and learn to become car mechanics, or keep making today's equivalent of buggy whips.

This rapidly approaching merging of process automation and capture is making marketing sizing increasingly complicated. A few years ago, document imaging handed off a digitized document to a workflow engine. There was a fairly clean division. Now, not so much.

This also raised the back of mind issue I've been grappling with to the forefront: how do these blurred lines impact our coverage of this industry? That's going to be "fun" to unpick in the coming year.

Don't forget to secure your seat for the European virtual round tables on November 5. Spots are limited to 20 attendees per session (10 and 3 central European time).

Here's what some of the September Capture 2020 virtual roundtable attendees had to say:

■ It was a good meeting today. Thanks." Global Sales Leader, Major Vendor

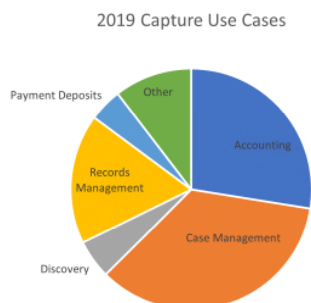
■ It was a valuable event. I hope next year we could organize it face to face." Principal Program Manager, Global Software Company  
Register here: <https://bit.ly/CaptureRoundTables>

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It includes the application of not only image processing and OCR/ICR, but also more advanced technologies like voice recognition, Natural Language Processing, sentiment analysis, video understanding and more. These technologies will be made available as containerized services to be called on demand in the cloud.

"As the decline in the use of paper accelerates due to the pandemic, we expect the demand for Capture 2.0 services to increase," said Gammon. "Infosource's metrics show the worldwide market potential for Capture 2.0 services as being worth more than \$30 billion."

Case management was the most popular use case for Capture in 2019, worth 35% of the market, with accounting second at 28%. Just four years ago, records management was even with them, but as Capture moves upstream in many applications, even though records management is still in high demand, it is not the primary business driver for implementing Capture.



EMEA was the fastest growing region for Capture in 2019 and accounted for 37% of Worldwide Sales. North America was the leading region at 48% of sales. Asia-Pac and Latin America accounted for the remaining 15%.

Thanks to its acquisitions of Nuance Document Imaging and Top Image Systems, Kofax regained its position as worldwide market leader, although considering the 2018 revenue of the three separate companies now aggregated under Kofax, the ISV actually lost share in 2019 (when not considering RPA revenue). OpenText was second, following by IBM and ABBYY.

The RPA market continued to grow rapidly in 2019, but Infosource expects that to slow down, as recently we've seen a wave of acquisitions

by larger ISVs, which will apply price pressure to the RPA market. In addition, many RPA vendors are looking to add more traditional Capture technology to drive growth, which will reduce the rate of standalone RPA growth.

For more information on Infosource Software's annual Worldwide Capture Report and/or a TOC, contact Ralph Gammon at:

[rg@infosource-analysts.com](mailto:rg@infosource-analysts.com).

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the dawn of time. Sometimes, like the Black Death in Europe, they usher in dramatic social upheaval. Other times, such as the 1918 flu epidemic, the result is "only" death and suffering. My point is we're all ping-ponging off of today's reality and in the process of creating the "next normal." Always.

Relative to this industry, this "next normal" is going to involve using capture, process automation, and content services singly and in combination to make work possible in a new world of work from home.

Office work, pre-COVID style, is going to change. Twitter had already announced before the pandemic that employees could work from anywhere. I suspect that the majority of white-collar work will achieve an equilibrium between all office/all home depending on the type of work people are doing (and how good the management team of a company is). Even I, as pre-old-man curmudgeonly as I can be, recognize the value of face-to-face interactions.

I don't know what the "next, next normal" is going to be like (hopefully better than what we're living through now). I do think that all of the companies and technologies we cover in *DIR* and as Infosource more broadly will be a cornerstone for efforts to create a world where people can work from anywhere because their work documents and information can move wherever they are; a world where the customer experience is satisfying (well, or at least not annoying); and a world that streamlines and simplifies how people get work done.

Comments, criticisms, and witticisms welcomed.

Bryant

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