

IDC MarketScape

IDC MarketScape: Worldwide Print Management Solutions Independent Software 2024 Vendor Assessment

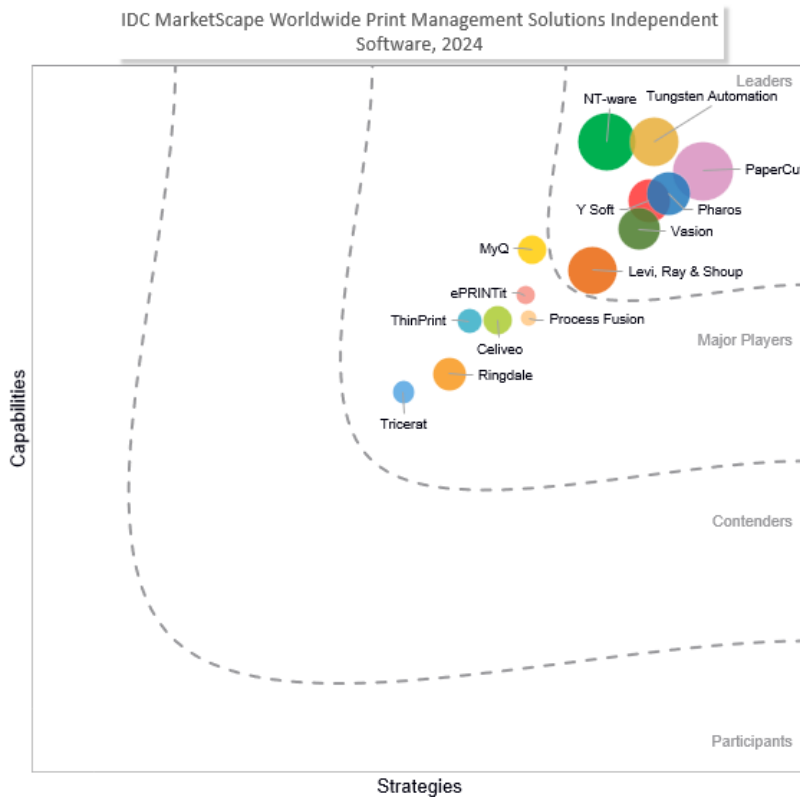
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THIS IDC MARKETSCAPE EXCERPT FEATURES PROCESS FUSION

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Print Management Solutions Independent Software Vendor Assessment



Source: IDC, 2024

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Print Management Solutions Independent Software 2024 Vendor Assessment (Doc # US51189824). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study assesses the market for print management solutions among select independent software vendors through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that position vendors for success in this important market. This IDC MarketScape covers a variety of software vendors and is based on a comprehensive framework to evaluate print management solutions. Organizations using the IDC MarketScape for print management solutions can identify vendors with strong offerings and well-integrated business strategies aimed to keep the vendors viable and competitive over the long run. Capabilities and strategy success factors identified from this study include:

- Current solutions portfolio with product-specific services and features to address a wide-ranging print landscape
- Road map to address specific customer challenges related to print infrastructure
- Capabilities and strategies to help customers achieve an optimal secure print environment
- A holistic approach to delivering horizontal and vertical print management solutions through direct and partner-led engagements
- Continued expansion into new geographic territories, vertical industries, and line-of-business applications
- Flexible service and solution development and delivery, pricing, and billing models and the ability to support on premises and private and public cloud
- An innovative approach to print management that includes the utilization and integration of artificial intelligence (AI)

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This document includes an analysis of 14 prominent print management independent software vendors with wide-ranging extensive product portfolios to specifically address printing environments on a global scale. Vendors must offer a solid portfolio of print management solutions and meet one or more of the following criteria: revenue of \$8+ million annually, revenue of \$5+ million annually with at least 20% in two of three specified geographic regions (Americas; Europe, the Middle East, and Africa [EMEA]; Asia/Pacific), and/or 100+ employees. Given this approach, certain independent software vendors have been excluded based on worldwide revenue or company size. Also excluded from the study were indirect channel partners and hardcopy equipment manufacturers.

ADVICE FOR TECHNOLOGY BUYERS

Print management, across an enterprise, can be an enormous challenge as pressure to optimize print device usage, control costs, and provide security remains an operational priority. For most companies, print is decidedly regarded as a burden rather than a key component of the corporate infrastructure; however, when print is interrupted, it becomes essential. The emergence of an increasingly hybrid workforce presented many challenges to organization's IT, and with print specifically. Businesses grappled with a rise in remote and home workers who were prevented access to business processes, applications, and common business tools, such as print. As the COVID-19 pandemic persisted, it resulted in demand for more digital tools to target remote workers. End users now expect access to business processes, applications, and tools from anywhere, at any time.

Organizations increasingly seek viable cloud print management solutions, as print management is a laggard among IT offerings when it comes to the shift to the cloud. In recent years, organizations' desire for more predictable budgeting and flexibility has prompted vendors to increasingly offer SaaS pricing models.

Print security is increasingly important, as print can offer an entry point for malicious actors, even as workers print increasingly from remote locations. Coupled with a mounting need to provide secure continuous access to information and tools that drive productivity and efficiency, organizations are looking for flexibility and scalability in solutions offerings. Direct alignment of print solutions with business needs provides flexible pricing models, modular offerings available on a subscription basis, and services to deploy and integrate.

Accordingly, organizations should ask the following questions when considering print management software:

- What core needs exist, companywide, when it comes to print management: cost savings, better print job control, improved visibility into device usage, reduction in IT burden, and improved user print experience?
- Has the hybrid working model changed the printing landscape? Does this require a change in how print security and printer access need to be managed?
- What will the key metrics be for successful print management: reduction in overall print devices, supply cost reduction of ink and toner, improved worker productivity, enhanced document security, measurement of sustainability metrics, and companywide print activity tracking?
- How will the print management solution address industry-specific considerations?
- Can organizations start small and scale up with users, devices, features, and services?
- What is the typical length of time for installation and deployment?
- What considerations need to be made with displacing an existing print management solution?
- What is the cost of a print management solution and what are the available billing methods – pay per user, pay per device, pay per print, and enterprisewide licensing?
- How will upgrades, updates, service, and maintenance be handled?
- What type of internal IT support will the print management solution require?
- What is the user experience like? Is it intuitive and consistent across devices?
- What types of deployment options are available: on premises, private cloud, public cloud, and hybrid? How easy is it to transition among the deployment options once a solution is in place?

This IDC MarketScape evaluates independent software vendors and helps answer these questions and others. The purpose of the IDC MarketScape is to provide enterprises with the ability to identify vendors with strong offerings and well-integrated strategies.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Process Fusion

Process Fusion is positioned as a Major Player in the 2024 IDC MarketScape for worldwide print management solutions independent software.

Process Fusion is a provider of cloud-based document automation and digital transformation solutions. The company specializes in streamlining business processes through innovative technology, enhancing efficiency, reducing operational costs, and improving overall productivity. The company was founded in 2004 and is headquartered in Toronto, Ontario, Canada. With a focus on digital transformation, Process Fusion has a bold vision and a portfolio of solutions designed to automate workflows, manage documents, and ensure secure information exchange.

Process Fusion's print management solutions include:

- **UniPrint Infinity** is a comprehensive print management solution designed to simplify and secure the print environment, offering features like secure pull printing, mobile printing, and cloud printing. Process Fusion's UniPrint Infinity offers a pdf-based universal printer driver, a web-based management console, and a virtual print queue. The company promises users savings between 20% and 40% on print costs and up to 75% reduction in print-related help desk tickets.
- **UniPrint InfinityCloud** is the cloud-based version of UniPrint Infinity offers the same functionality of UniPrint Infinity but over the cloud, further reducing costs and print infrastructure. This product is also marketed as PF 360 Print as part of Process Fusion's PF 360 platform of business process automation (BPA) and cloud print management tools.

In addition to its print management solutions, Process Fusion offers a suite of business process automation tools as part of its PF 360 Platform:

- **PF360 Capture:** PF 360Capture is a full-featured document capture solution. Process Fusion's intelligent capture capabilities, which leverage OCR and machine learning, play a key role in many of the company's other BPA tools.
- **AP Automation:** AP Automation is an automated end-to-end accounts payable application that leverages intelligent capture to help capture, classify, extract, validate, export, archive, and report accounts payable information.
- **Cloud Fax:** Cloud Fax is a scalable digital fax solution that integrates with Process Fusion's intelligent capture to automate workflows via faxes sent and received.
- **Digital Mailroom:** Digital Mailroom is a solution to more efficiently capture, process, and manage physical or digital mail documents and help automate and standardize related processes.

- **E-Referral Management:** E-Referral Management is a capture-driven solution to help modernize healthcare referrals while reducing errors, automating reporting requirements, and complying with business rules.

Quick facts about Process Fusion include:

- **Employees:** ~100
- **Global market coverage:** Process Fusion is distributed in North America, Europe, Asia, and the Middle East and Africa.
- **Top industry focus:** Services, distribution/logistics, healthcare, real estate, construction, manufacturing, financial, and public sector (Process Fusion has customers in other segments as well.)
- **Ideal customer size:** Process Fusion is focused on clients with 50-500 employees.
- **Distribution:** Sells through direct sales as well as OEM partners such as Xerox, and Ricoh, as well as resellers and strategic partners in the channel
- **Print management solutions:** UniPrint Infinity, UniPrint InfinityCloud
- **Delivery models:** Cloud SaaS and on-premises
- **Interoperability (internal):** Process Fusion has a variety of business process automation offers as part of its PF 360 Platform, which includes Process Fusion's cloud print management offerings, as well as its PF360 Capture and related BPA tools.
- **Interoperability (external):** Process Fusion's on-premises solution integrates with active directory, Epic, authentication products such as Imprivata, virtual platforms including Citrix, VMware, and RDP virtual channels, and Apple AirPrint. The cloud solution integrates with cloud storage (Google Drive, OneDrive, SharePoint), Microsoft Universal Print, identity providers (Entra ID, Okta, OneLogin, Google Workspace), OpenText XMedius Fax and XMedius SendSecure, and Epic.
- **Key differentiator:** Process Fusion has a larger vision beyond print management. The company's goal is to digitize and automate a large set of business processes beyond print, but with printing as a part of the solution.

Strengths

- **Innovation and stability:** UniPrint has a strong reputation in the print management market, with users reporting that they favor the innovation and stability of the UniPrint platform.
- **Strong vision for AI in print and output management:** Process Fusion has already embraced AI and has definitive plans to further use AI beyond what a majority of the market have indicated.
- **Exclusivity among limited numbers of resellers is a differentiating point:** The resellers that offer UniPrint seem to believe there is a much greater profit opportunity due to the limited number of VARs and resellers that distribute the solution compared with competitive solutions.

Challenges

- Process Fusion needs to better articulate how some of its product evolution can drive growth, particularly in new vertical markets.
- UniPrint does not have some of the fleet management tools that almost all of the other print management solutions offer.

Consider Process Fusion When

Users that are looking for print management and process automation solutions that are both innovative and able to evolve as company needs change should consider Process Fusion.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

For the purposes of the 2024 IDC MarketScape for worldwide print management solutions, IDC defines print management as "tools that are software based for tracking, measuring, monitoring, reporting, and managing end-user behavior and the printed output produced by office imaging equipment deployed as part of a networked fleet of devices. Functionality includes, but is not limited to, rules-based printing, pull printing, secure print release, and job auditing and accounting."

In addition, this segment includes mobile printing solutions that deliver print jobs from a mobile touch point (smartphones or tablets) to an output device using cloud (external) or an internally hosted server. These tools include both secure enterprise (behind the firewall) deployments and public (cloud) printing solutions. Direct peer-to-peer print or direct wireless print is excluded. Pages are tracked in the same manner as if jobs were initiated from a PC or laptop (and may be managed by the toolset previously described).

LEARN MORE

Related Research

- *Worldwide and U.S. Device and Print Management Market Shares, 2023: Transition to the Cloud Accelerates* (IDC #US50780624, June 2024)
- *Worldwide and U.S. Document Solutions Software Forecast, 2024-2028* (IDC #US50780524, June 2024)
- *IDC FutureScape: Worldwide Imaging, Printing, and Document Solutions 2024 Predictions* (IDC #US51283923, October 2023)
- *Market Analysis Perspective: Worldwide and U.S. Document Solutions, 2023* (IDC #US51234523, September 2023)
- *IDC MarketScape: Worldwide Print Management Solutions Independent Software 2021 Vendor Assessment* (IDC #US47348521, December 2021)

Synopsis

This IDC study assesses the market for print management software solutions among the most prominent global independent software vendors and identifies their strengths and challenges. This assessment discusses both quantitative and qualitative characteristics that position vendors for success in this important market. This IDC study is based on a comprehensive framework to evaluate print management delivered within the context of an engagement.

"As the way we work and the way we collaborate changes, print management solutions are a key part of print and IT modernization. Increasingly, this means moving print management to the cloud, where most other IT services already reside, and shift toward SaaS pricing, which offers more predictability in the budgeting process. As the print management landscape evolves, buyers should seek a print management solution that aligns with their business and technology goals and objectives," says Geoffrey Wilbur, research manager, IDC's Imaging, Printing, and Document Solutions group.

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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