Managing enterprise print
Don’t let legacy get in the way of business advantage
The reality of managing print in enterprises today

In a typical large organisation there’s nothing simple about printing.
There’s all of the printing, copying, faxing and scanning your employees do: whether in an office, shop, warehouse, factory, at home or elsewhere. There’s all of the bulk and professional printing carried out by your own print rooms and by external commercial printers. The machines in use across your organisation for printing, copying, scanning and faxing have become complex networked devices, part of your IT infrastructure whether they’re formally managed by IT or not.

How confident are you that your organisation is managing this complex environment efficiently and effectively across your whole enterprise?

Who’s responsible for print in your organisation?
We asked Coleman Parkes Research to survey 400 senior decision-makers in finance, IT and other relevant business functions to find out what organisations like yours are doing, how well they’re managing, and whether they’re looking to make improvements.

We found that fewer than one third of those surveyed have a single person or role responsible for managing and maintaining print services at enterprise level. The majority distribute responsibility for print services by country or region (25% of those we surveyed), by print environment (19%) or both (28%).

This is hardly surprising. Multinational organisations often break down responsibilities regionally.

And print technology developments – from standalone to networked devices, from expensive to inexpensive – have tended to create a confusion of local responsibilities; nowadays decisions for different devices or environments are split among IT managers, site or facilities managers, department heads and procurement.

Is this a problem?
For many organisations this is simply the way things are and many don’t necessarily see a problem with it. Of the organisations surveyed that don’t have any formal enterprise-wide print strategy, fully 87% say it’s because managers and staff are capable of making their own print-related decisions and a third don’t see a need for an enterprise strategy.

We don’t doubt that managers and staff can make intelligent print-related decisions, but they’ll inevitably do so without any view of the ‘bigger picture’. Certainly the organisations that approach Xerox for help with print services have found that a decentralised approach has led to a proliferation of different office devices, too many external suppliers and under-used in-house print centres. Inefficiencies proliferate and costs explode. And despite the apparent wealth of choices and power to make appropriate local decisions, it’s all too common for employees not to be able to find a printing or copying machine that works or that has the functions they need.

Does any of this sound familiar?

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1 Examples of different print environment include office printing, in-house reprographics or print rooms, off-site commercial printing and remote printing.
About the research
Early in 2010 Coleman Parkes Research completed 400 telephone interviews:
- 100 each in the US, UK, France and Germany
- 100 each in the following sectors: government, healthcare and pharmaceuticals, financial services, professional services
- 104 CIOs/IT directors, 94 CFOs/finance directors, 106 facilities directors/managers and 96 heads of department

All interviews were conducted in strict accordance with the rules and guidelines laid down by ESOMAR and the Market Research Society.

Definitions
The interviewer explained that ‘print services’ was to be taken to mean all printing done on printers, copiers and multi-functional devices in five different ‘print environments’: office, print room, data centre (bulk printing from enterprise data sources), off-site commercial printers and remotely.

Note about results presented here
Unless country or sector differences are specifically mentioned, the average results presented are broadly representative of all the countries and sectors surveyed.

Nature of responsibility for managing and maintaining print services and print facilities in the company

- **Single person/function at enterprise level**: 29%
- **Different persons/functions in each location (responsible for all print environments in that location)**: 28%
- **Different persons/functions for each printing environment (responsible for that environment across enterprise)**: 19%
- **Different persons/functions responsible for each printing environment in each location**: 25%
Trends in managing enterprise print services

We asked the survey respondents what their main business challenges are with respect to print services. No fewer than 11 different issues were rated by them as significant or very significant.

What are your key challenges?
Overall, cost emerged as the leading challenge (43% rated it as significant or very significant), followed by security (38%); capital expenditure (23%) and staff training/awareness (23%).

This ranking holds across countries with some small differences (eg, in the UK security is of more concern than cost and capital expenditure comes several places lower in the US ranking; see graph for full breakdown).

In terms of the different sectors surveyed, healthcare/pharmaceuticals stood out in terms of the perceived severity of print-related challenges, with 79% finding cost to be a significant or very significant challenge, followed by 50% for security, 47% for staff training, 43% for capital expenditure and 42% for exploiting new print technologies.

What can I do about it?
Faced with such a wide variety of challenges, half of the survey respondents disagree with those who don’t see the need for an enterprise-wide print strategy. 52% of the survey respondents said that they are very likely or quite likely to move towards a more enterprise-wide approach to print management in the foreseeable future (this average does hide some regional differences: in the UK it’s only 31%, in the US it’s 70%).

This reflects a growing change in mindset that we’re also seeing in our clients: from acceptance of the status quo to a view that a single enterprise strategy is both possible and beneficial. Many organisations are interested in breaking down traditional print silos and managing all of their print environments – office and remote print, in-house production print and procured print – as a single resource.

Why move to an enterprise approach?
Imagine a single team managing all of your print environments using a common set of technologies, standards, operational processes and service level agreements. If they know what they’re doing and have the right tools, they can:

- Rationalise devices and suppliers and ensure optimal use of resources, including the right balance between in-house and procured print
- Implement a single usage policy and intelligent print rules to encourage cost-effective and environmentally friendly practices
- Leverage economies of scale and achieve the best prices with consumable suppliers and commercial printers
- Have complete visibility of the actual use and cost of all areas of print, down to individual devices and users
- Enforce security policies such as file encryption or secure printing processes
- Track the movement of sensitive documents and create print and scanning audit trails
- Let people print easily whether they’re at their desk, another site, in a different country, or at home
- Monitor all print services and fix issues before they become problems
- Keep pace with changing business needs for print services

Efficiency and cost savings, environmentally friendly printing, better visibility and control, integrated security and productivity improvements: these are the benefits that organisations are seeking when they look into an enterprise print strategy.

Do they know something I don’t?
How do you know if this is the right approach for you? Maybe you’re not convinced there’s anything wrong with the way you’re handling print right now. Maybe you think that even if an enterprise-wide approach has benefits, they won’t outweigh the expense and upheaval of implementing such an approach. Or maybe you are convinced, but you don’t know how to get started and you need more than a gut feel to convince others.

Every organisation is different and we’d never recommend that you try to address your print-related challenges based on gut feel or what others are doing. But you could be missing a real opportunity to transform business efficiency and productivity if you simply accept the status quo. So what should you do?
Main challenges overall with respect to print services

- Print-related costs
- Data/information security
- Controlling capital expenditure on printing equipment
- Staff training/awareness
- Exploiting new printing technologies
- Lack of cost transparency
- Getting senior management support
- Improving transparency around remote/home worker printing
- Getting print services viewed as a key corporate priority
- Environmental/sustainability issues
- Too much printing leaking off-site

% of respondents rating issue as significant or very significant
What to do?

Assessing and succeeding with an enterprise print strategy requires a shift in mindset and a new perspective on what’s possible with document output services. In our experience, organisations that succeed in making this transformation do four things.

1. Appoint a change agent
   You need someone within your organisation – a print services change agent – who has the vision, will, authority and executive-level sponsorship to break down the traditional print silos and give the new strategy the support and resources it needs.

   Most of the organisations we surveyed do recognise this: 64% feel that they could achieve greater efficiencies in print management if responsibility lay with one person and 82% feel they could achieve greater efficiencies if decisions relating to print services were taken higher up the organisation.

   If we look at those surveyed who already have a single person or role responsible for print services at enterprise level, the research suggests that in more than two-thirds of cases it’s the CIO who is assuming this responsibility, except in the UK (where it’s another director-level function).

2. Establish an accurate baseline
   You need an absolutely accurate baseline from which to assess the potential for improvement and against which to measure improvements. So start with an in-depth, thorough assessment of your existing setup. If your organisation, like the majority we surveyed, has print-related targets for costs, uptime/performance, environmental sustainability, security or impact on productivity, you’ll need accurate measurements to assess performance against targets anyway.

   Don’t rely on guesswork, industry averages or simplistic tools to obtain an estimate. A proper assessment of a large organisation takes weeks with established tools and models; longer if you’re learning as you go. If you don’t have the time, staff, tools or experience to do it yourself, get help; you won’t be tied into anything and the rewards typically far outweigh the cost.

3. Build a realistic business case
   Once you know where you stand you can assess what you stand to gain by rationalising and centralising systems and processes across print environments, geographies or other organisational barriers.

   Look for synergies that can be achieved by sharing resources across silos and managing multiple print environments as one; but don’t rely on wishful thinking. To have any chance of success, a business case for change must be based on a very clear and realistic model of what can be achieved from your starting point. Whether you do it in house or get outside help, make sure that whoever is building the business case has the appropriate expertise.

4. Assess the help available
   Few organisations have the resources or experience to actually implement an enterprise-wide strategy successfully. But many are unsure about the idea of getting help through a managed or outsourced service.

   Virtually every survey respondent was familiar with the idea of managed print services, and 59% agree that they could achieve greater efficiencies in print management if it were outsourced to a third-party provider. But only half of respondents have considered a managed print service; of the half that haven’t, the chief concern across all countries, sectors and print environments is information security. Cost and loss of control are also concerns, but generally only half as much of a concern as security (there are country and sector differences in the ranking and extent of these two issues).

   We’re familiar with these concerns: they’re sometimes expressed by the organisations that approach us and clearly it’s the job of the managed print service provider to address them. And in many cases they clearly can be, and have been, satisfactorily addressed.

   Of the half of respondents that have considered managed print services, we see that the majority do outsource at least one of their print environments (see graph on the next page).

   In the UK and US, outsourcing by those who’ve considered it is extremely high across all print environments; in France and Germany the conversion rate is much lower but still common for office printing, print rooms and commercial printing.
Proportion who agree to at least a moderate extent that greater efficiencies in print management could be achieved if…

- Decisions relating to print services were taken higher up the organisation: 82%
- Decisions were made and responsibility was held by one person: 64%
- Management of print services was outsourced to a third party provider: 59%

Of those who’ve considered managed print services, proportion with a managed print contract in place:

- Commercial printers: 85%
- On-site/off-site print room: 80%
- Office: 87%
- Data centre: 82%
- Remote/homeworker devices: 78%
Conclusion

An enterprise-wide print service strategy might or might not be right for your organisation. But you can’t know unless you do the necessary up-front assessment, weigh the potential benefits against whatever concerns you have, and see if your concerns can be addressed.

If your organisation is typical, we think you’ll find that the rewards are worth it. As we’ve seen, the print environment holds major management challenges for large organisations, and there’s been a significant swing in the way that enterprises address these challenges as they’ve grown more complex. A decade ago outsourcing print management was something of an experiment; today it’s a recognised and frequently implemented model. A decade ago print silos weren’t even on the management agenda; today, half of those we surveyed are actively looking to break down these silos. If your organisation is struggling with legacy environments and legacy mindsets, these new perspectives may be the breakthrough you need.

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