



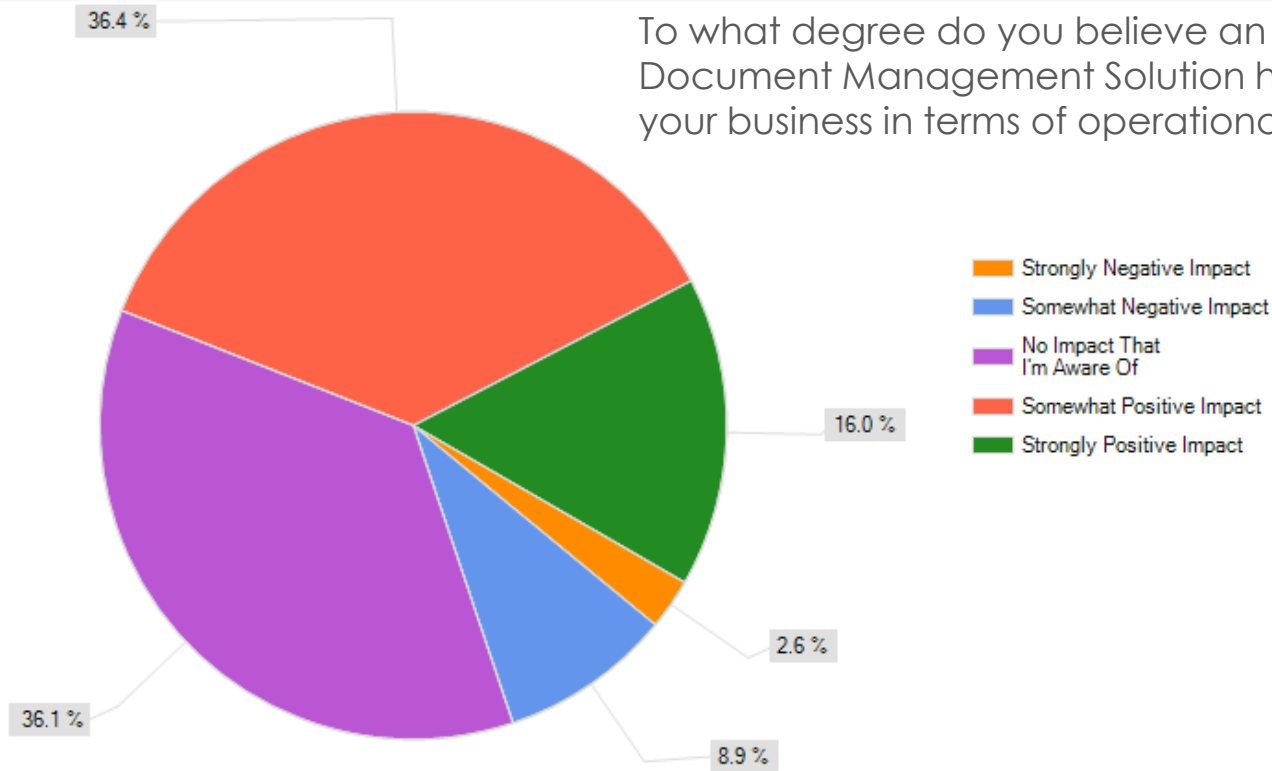
# Fellowes Industry Survey Topline Results

September 10, 2012

*All information sourced from 2012 Fellowes Industry Survey, conducted with Research Now*

# In-House Positively Impacts Business

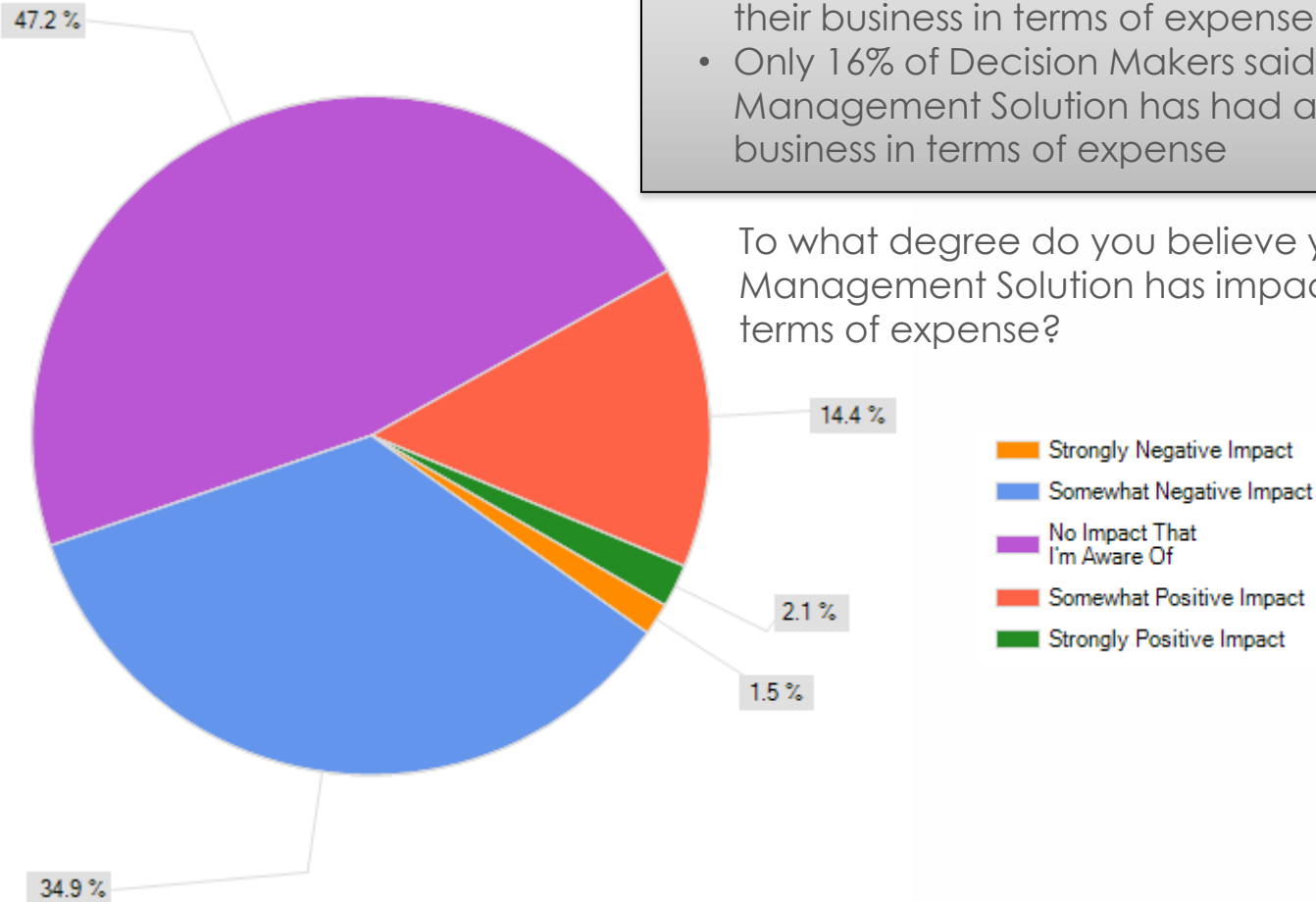
- 52% of current users of an in-house Document Management Solution say their in-house Document Management Solution has had a positive impact on their business in terms of operational expense
- Only 12% say that their in-house Document Management Solution has had a negative impact on their business in terms of operational efficiency



All information sourced from 2012 Fellowes Industry Survey, conducted with Research Now

# Off-Site Expense Brings Neutral or Negative Impact

- 37% of Decision Makers said their off-site Document Management Solution has had a negative impact on their business in terms of expense
- Only 16% of Decision Makers said their off-site Document Management Solution has had a positive impact on their business in terms of expense



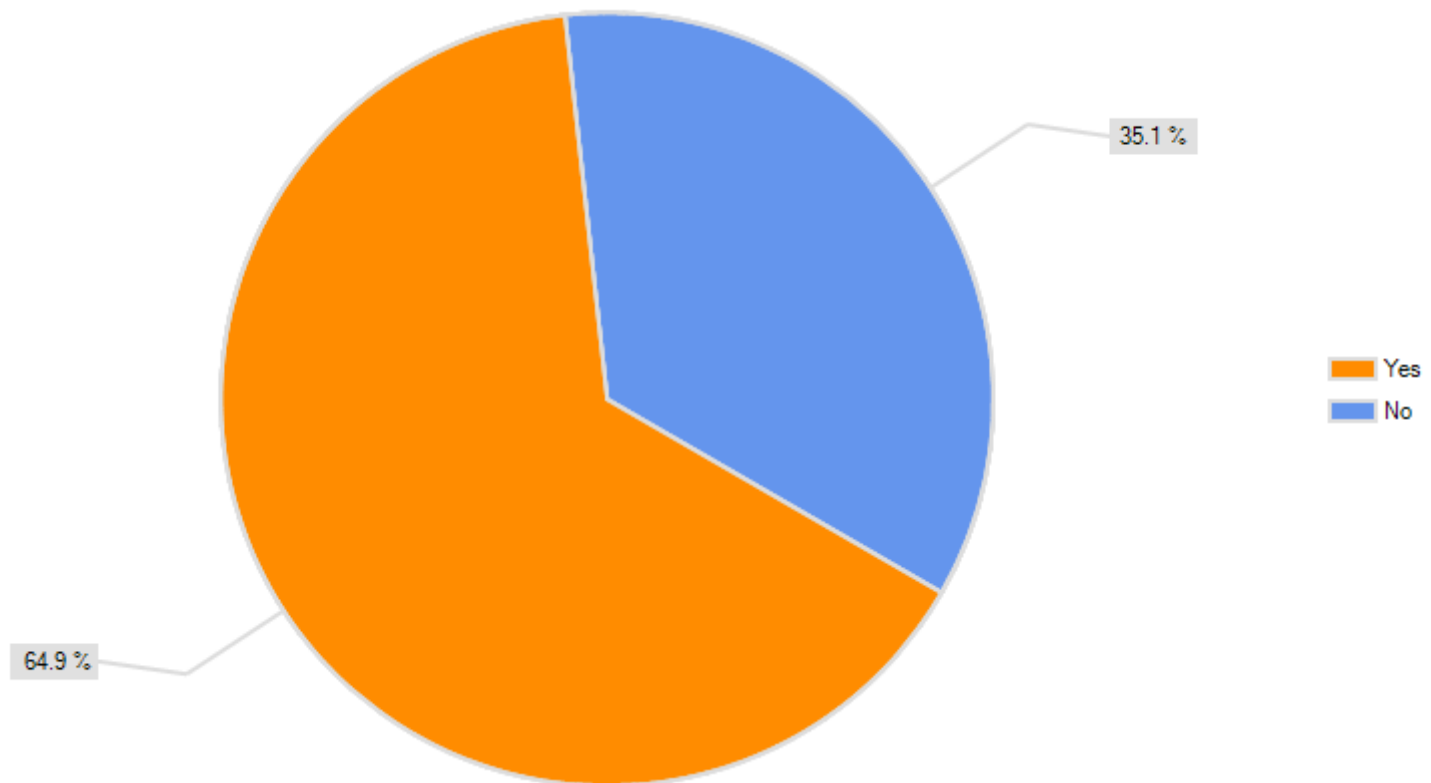
- Strongly Negative Impact
- Somewhat Negative Impact
- No Impact That I'm Aware Of
- Somewhat Positive Impact
- Strongly Positive Impact



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# Cost is a Major Decision Factor

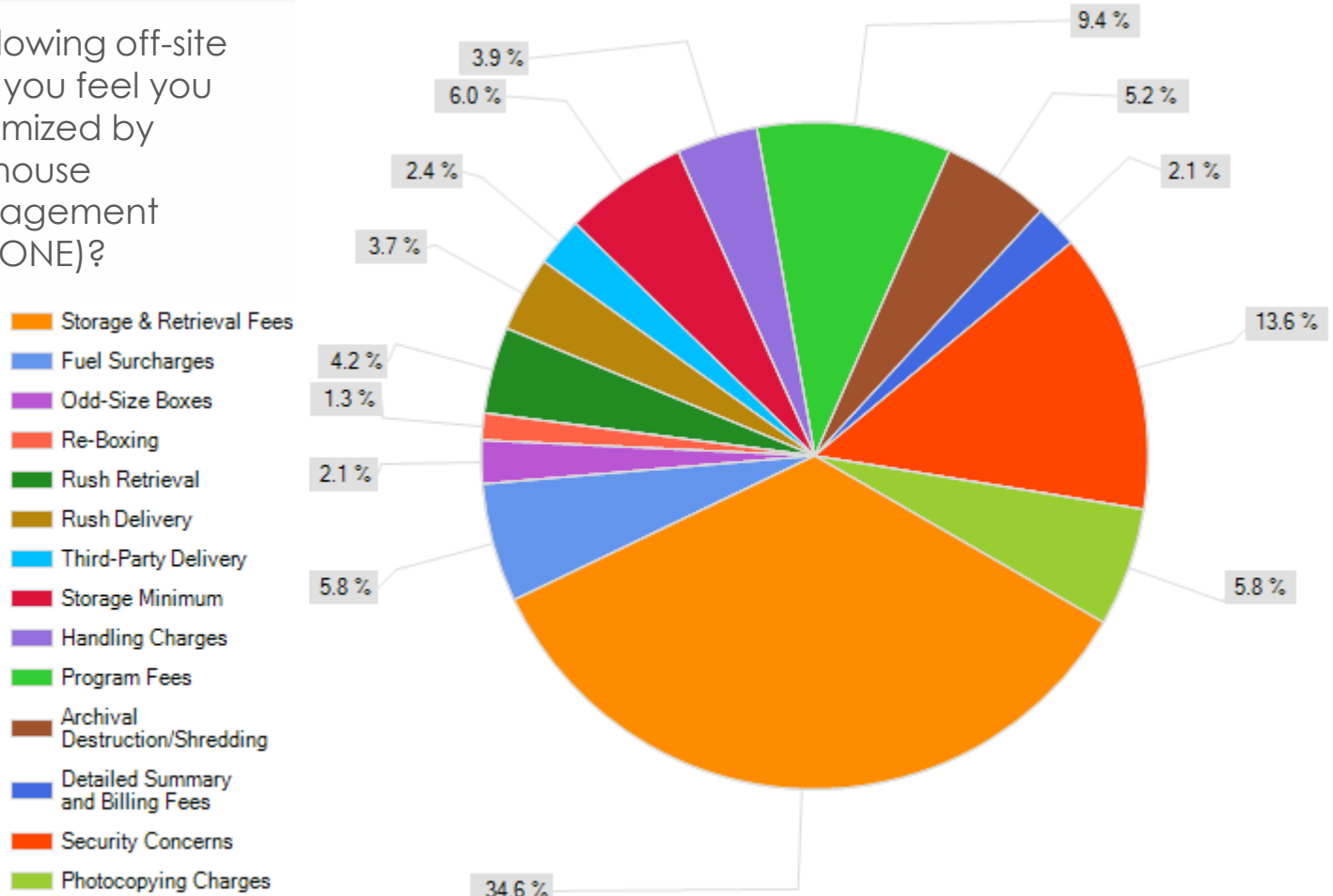
Were costs uniquely associated with off-site document storage, shredding, binding, and laminating a decision factor in your organization's decision to perform these solutions in-house?



# Cost Savings Realized with In-House

- 35% of current users of an in-house Document Management Solution say they have most minimized their Storage & Retrieval fees by choosing an in-house Document Management Solution

Which of the following off-site costs or fees do you feel you have MOST minimized by choosing an in-house Document Management Solution (Select ONE)?



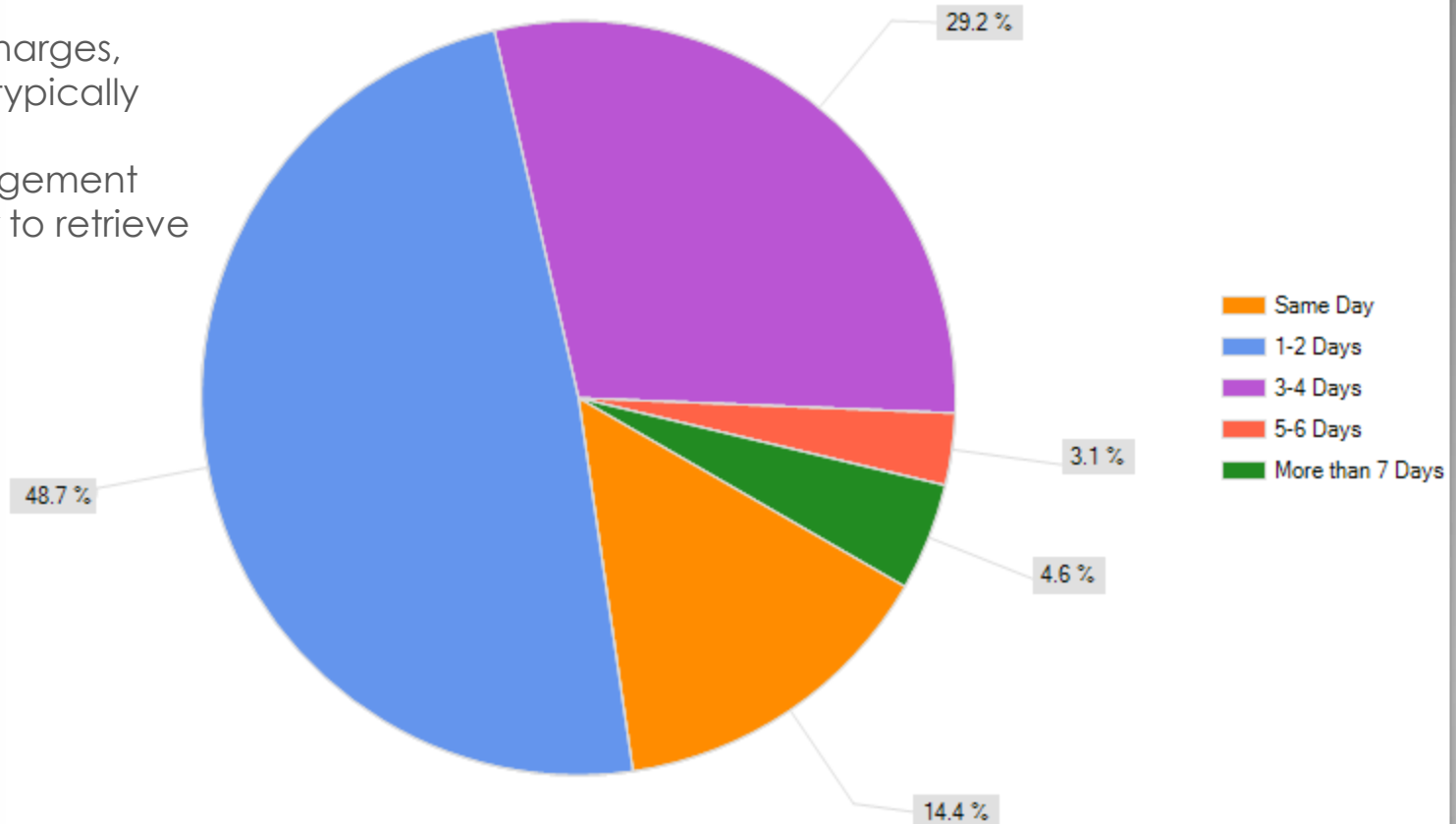
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# Off-Site Provider Takes 3x Longer to Retrieve and Deliver Documents

- Only 14% of Decision Makers said their current Document Management Solutions provider retrieved their documents same day as requested
- 32% of Decision Makers said it takes their provider 3+ days to retrieve and deliver documents

Without incurring rush/additional charges, how long does it typically take your current Document Management Solutions provider to retrieve and deliver your documents?

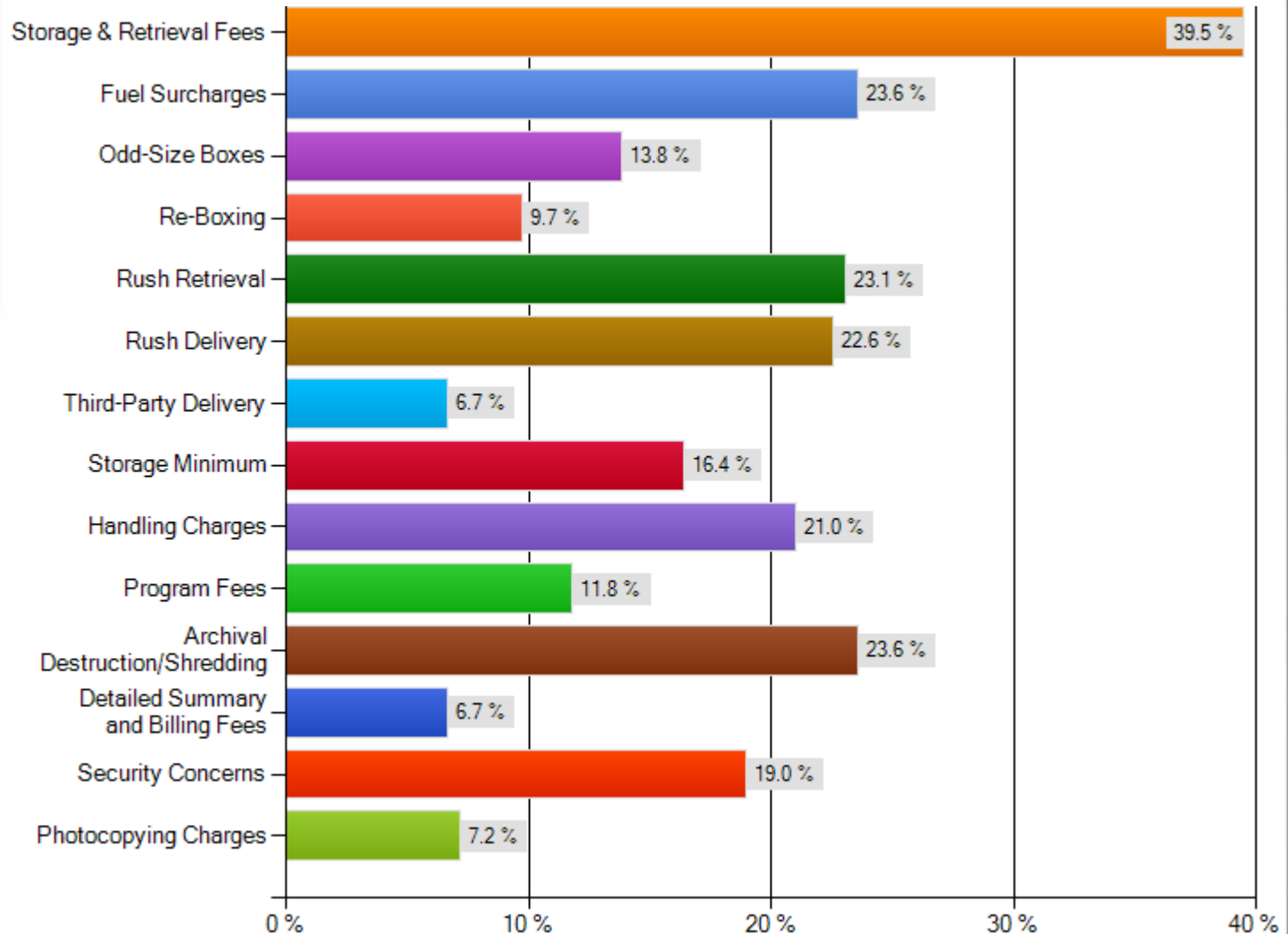


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# Many Fees Detrimental: But Especially Storage & Retrieval Fees

- 40% of Decision Makers feel Storage & Retrieval fees have been detrimental to their business

Which of the following off-site Document Management Solution costs or fees have been detrimental to your business?



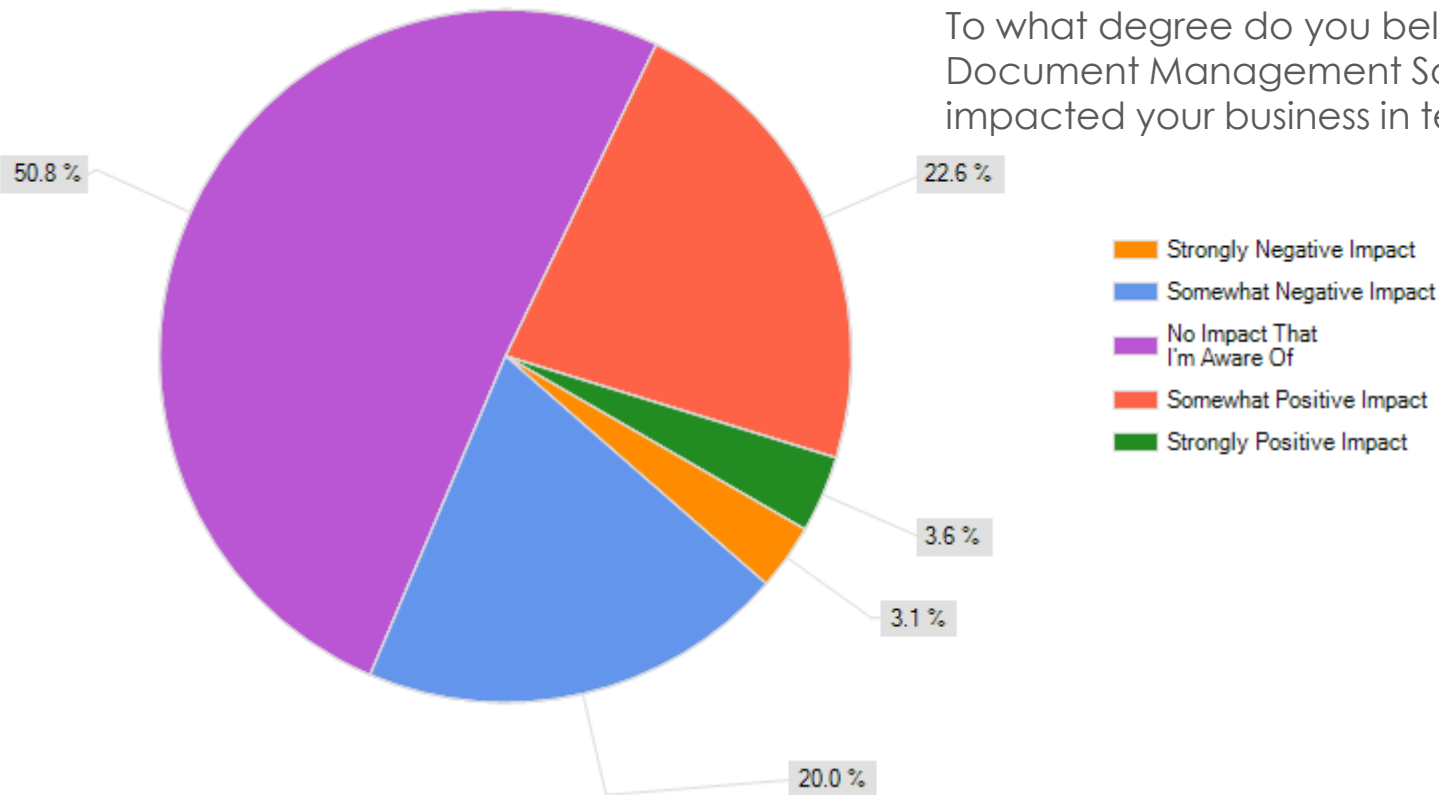
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# Few Users Feel Off-Site Contributes to Efficiency

- Only 26% of Decision Makers believe their off-site Document Management Solution has had a positive impact on their business in terms of efficiency. Therefore, 74% of Decision Makers believe their off-site Document Management Solution has had No Impact or a Negative Impact on business efficiency

To what degree do you believe your off-site Document Management Solution has impacted your business in terms of efficiency?



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# Appendix: Research Methodology

# Research Methodology

- A 10-minute questionnaire via Research Now, to meet the following criteria:
  - Must work for a company with 1-1,000 employees
  - Must currently use in-house or off-site
  - Must be the prime decision maker or influential in the decision making process for Document Management Solutions within their company
- Each panel response was screened for validity; only respondents that met quality standards were included
- Survey was fielded from Monday, July 23 through Thursday, July 26
- 575 responses were collected

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