



## Company Fact File

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### OCÉ BUSINESS SERVICES FACT FILE

#### **Background:**

Océ Business Services helps corporations, law firms and public sector organizations better control their document management processes in order to reduce costs, improve operations, and mitigate risk. Our spectrum of managed solutions spans the document lifecycle, from document creation through disposal. These solutions include print/copy, fleet, mail services, Six Sigma®-based performance management, records management and electronic discovery.

#### **Key Facts:**

- **Headquarters:** Océ Business Services is headquartered in New York, NY USA, with significant operations in Salt Lake City, UT and a high volume production facility in the Philippines. Primary sales offices are in Atlanta, Boston, Charlotte, Chicago, Dallas, Detroit, Hartford, Houston, Los Angeles, San Francisco, St. Louis, and Washington, D.C.
- **Number of Employees:** Approximately 6,000 employees are located in the U.S., Canada and the Philippines. The total number of employees worldwide is 8,000.
- **Revenues:** The worldwide annualized revenue of business services activities at Océ Business Services is approximately €500 million, or \$685 million USD
- **Number of Sites:** 800 client sites in N.A., 1,250 worldwide. North America operations span the U.S., Canada and Puerto Rico; European operations span the United Kingdom, Ireland, Belgium, France, Germany, Italy, Netherlands, Czech Republic, Iberia, Norway, and Switzerland.
- **Markets Served:** Océ Business Services primarily serves large and mid-sized enterprises, law firms and the public sector in North America. The company's strong vertical industry presence includes financial services and insurance, legal, manufacturing, technology, healthcare and pharmaceuticals, as well as government and education.
- **Industry Recognition:** Named to the Leaders Category of the IAOP Global Outsourcing 100 (2007, 2008 and 2009); ranked among the top two DPO vendors by the Black Book of Outsourcing (2007, 2008 and 2009); named a Top Provider of Electronic Discovery Services by the Socha-Gelbmann Electronic Discovery Survey (2006, 2007 and 2008)
- **Web Address:** [www.obs-innovation.com](http://www.obs-innovation.com)

#### **For More Information:**

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## **OCÉ BUSINESS SERVICES ADVANCED DOCUMENT PROCESS MANAGEMENT**

### **Document Services**

#### **Copy & Print Management:**

Our Copy & Print Management is a complete print, copy, scan and fax solution. Comprehensive onsite and offsite services include high quality color and B/W digital print and copy, binding and finishing, and specialized services such as Bates stamping. Services are delivered in a range of environments including the general office, centralized print/copy centers, and mission-critical high volume print, mail and insert data centers.

#### **Fleet Management:**

Océ Universal Fleet Management offers single-source accountability for managing office print, copy, scan and fax devices including billing, contract management, technical support, consumables and installation. These services and software encompass both Océ and non-Océ devices. Periodic reporting measures results and continuously improves fleet efficiency.

#### **Mail Management:**

Mail Management and Fulfillment is an onsite solution that streamlines document workflow through process redesign and innovative technology. Our comprehensive services include shipping and receiving, postage management, presort, courier and messenger management, pouch shipping, 1:1 communications and statements, accountable mail and package tracking.

#### **Imaging Services:**

We help organizations better manage document workflows and increase efficiency by applying imaging technology and process expertise. Services include high volume scanning of structured and unstructured documents, indexing and optical character recognition (OCR). Skilled onsite and offsite staff handle back file conversions, day forward scanning, litigation support, long-term secure digital archiving and migration, and backup and recovery.

#### **Records Management:**

Our accredited professionals help organizations control, manage, preserve and retrieve paper and electronic business records throughout their useful lifecycle. Services include the development of records policies and procedures, retention schedules, taxonomy design, file plan design, disaster recovery plans, preservation planning and audit programs. Océ RNA (Records Needs Assessment) is a consultative method to define requirements.

#### **Business Performance Management (Océ MAX™):**

Océ MAX is a unique business performance management system designed to manage document processes and outsourcing service providers. Its Six Sigma® based methodology and web-based application enables us to systematically measure, benchmark and continuously improve performance. The easy-to-use dashboard facilitates viewing and analysis of key performance indicators (KPI). Only Océ Business Services has it.

#### **Océ DNA (Document Needs Assessment):**

Océ DNA is an in-depth, onsite professional service that guides enterprises to identify and recover hidden document production costs. Using quantitative and qualitative analysis, our print specialists use a systematic methodology to prepare a comprehensive Océ DNA Report. The report is a roadmap for transformation that provides a recommendation and implementation plan that is vendor-unbiased and holistic in scope.

## Records, Compliance and Legal Solutions

### **Electronic Discovery:**

Electronic Discovery services consist of data collection, filtering, processing, review and production. Text and metadata is extracted and entered into CaseData™ ASP document review and search system. Native files are linked to the CaseData database for immediate review or can be exported to an external database. Data reduction mechanisms include culling and de-duping.

### **Paper Discovery:**

Paper litigation support services consist of high volume scanning, coding and optical character recognition (OCR). OCR services translate image files into text files. Coding extracts key information to make documents searchable and retrievable from a computer database. Coding services include bibliographic (objective) coding, subjective coding, in-text coding, re-keying, and quality assurance and sampling based on ISO methodologies.

### **Forensics:**

Forensics services comprise media restoration, data recovery and harvesting. We provide experts who can go onsite to evaluate the location of potentially responsive documents within large, complex data networks, recover deleted files, file fragments and temporary data from hard drives and other data storage devices, provide tape backup inventory, tape restoration and data inventory services.

### **CaseData™ ASP Document Review System:**

CaseData is an advanced web-based review and search application that offers secure, searchable access to litigation documents, regardless of whether they originated as paper or electronic data. An easy-to-use, scalable tool, it enables attorneys to collaborate on cases and securely exchange data. CaseData's advanced features include concept searching, enhanced proximity searching, and keyword pre-highlighting.

## Industry Thought Leadership

### **“Meeting the Challenge: How Organizations are Implementing Document Management Strategies to Help Drive Business in a Tough Economy”**

In order to stay competitive during the economic downturn, 51 percent of executives involved in document management say their company plans to reduce operating expenses while 20 percent say their organization will try to improve cash flow. Executives agree that effectively managing document processes can help meet these objectives, particularly with respect to reducing expenses. These are a few of the important findings highlighted in a comprehensive survey report issued by Océ Business Services. “Meeting the Challenge: How Organizations are Implementing Document Management Strategies to Help Drive Business in a Tough Economy,” investigates how survey respondents and their organizations are leveraging advanced document management activities to achieve cost reduction and gain other important business benefits. [Click here for the free report](#)

### **“The Discovery-Ready Enterprise III: Taking Steps to be Proactively Prepared”**

Despite the fact that a majority of corporate counsels surveyed (77 percent) see readiness for legal discovery as one of their organization's most important functions, a high number of these respondents (44 percent) also say their enterprise has not established any internal electronic discovery (eDiscovery) processes or technology. These and other key findings are spotlighted in a survey report issued by Océ Business Services. “The Discovery-Ready Enterprise III: Taking Steps to be Proactively Prepared” survey clarifies actions that in-house and law firm attorneys are taking in order to be better prepared to comply with discovery requests. [Click here for the free report](#)

## **OCÉ BUSINESS SERVICES SENIOR MANAGEMENT OVERVIEW NORTH AMERICA**



### **Joseph R. Marciano, President & CEO**

In March 2004, Joseph R. Marciano was appointed President and CEO of Océ Business Services Inc., Océ's document process management outsourcing company. In this role, he has overseen a significant expansion of the company's client base and an evolution of Océ Business Services into more comprehensive, advanced document process management technology, products and services.

In 1980, Mr. Marciano originally joined Océ's Arkwright, Inc. subsidiary, an international developer, manufacturer and marketer of digital imaging supplies for Océ and other brand owners. In 1985, he was named Corporate Controller and in 1988 became Vice President of Operations and member of the Management Committee. In 1994, he relocated to Chicago first to become Group Vice President, and then President of Océ Imaging Supplies.

In 1998, Mr. Marciano was named President of Arkwright, and integrated the manufacturing, logistics and R&D of Océ Imaging Supplies with Arkwright. In this role, he provided the strategic direction and leadership to guide Arkwright through a turnaround following a major shift in customer/product diversification.

Mr. Marciano holds a bachelor's of science degree in business administration from Bryant University in Smithfield, Rhode Island.



### **Walter Baransky, Chief Operations Officer**

Walter Baransky has served as Océ Business Services' Chief Operations Officer since 1998. In this role, he has overall responsibility for directing the organization's operational and technological functions, and is responsible for formulating policies and managing daily operations as well as the use of materials and staff to ensure the company meets profit objectives, business goals and growth strategies.

Mr. Baransky joined Océ Business Services as an Operations Manager in 1982 and, within one year, assumed the role of Division Manager, Facilities Management. In 1986, he became Director of

Courier Operations and the next year was promoted to divisional Vice President, Ground Operations. In 1990, he became Vice President, National Operations before assuming his current position of Chief Operating Officer in 1998. Prior to joining Océ Business Services, he was Director of Service Operations at Primary Control Systems Ltd.

Mr. Baransky received his bachelor's of arts degree in political science from City University of New York. He also is a Mail Systems Management Associate, and has been published in Modern Office and Technology Magazine.



**Elizabeth Halaki, Chief Marketing Officer**

Elizabeth Halaki has played a pivotal role in repositioning the marketing profile of the company to emphasize leadership in document process management. She assumed the top marketing post in 2004 and leads all strategic marketing and communications functions. In her role as Chief Marketing Officer and member of the senior management team, she is an integral part of the development and execution of the company's strategic plans.

Prior to joining Océ, Mrs. Halaki was Senior Vice President, Marketing & Business Development at Identrust LLC. Earlier in her career, at the consulting firm Booz Allen Hamilton, she focused on strategic and operational business issues of clients in the U.S. and in Europe for its financial services consulting practice. She gained her foundation in brand marketing at McCann-Erickson WorldGroup, where she served as Senior Vice President - Group Director and member of the Operating Committee, and at Bates Worldwide, as Vice President.

Mrs. Halaki received her bachelor's degree from the School of Arts & Sciences at Cornell University and an MBA in finance from University of Phoenix. She served on the Board of Directors of the New York City Audubon Society from 2000-02.



**Larry Kleuser, Vice President, Sales**

Larry Kleuser joined Océ Business Services in October 2003, and is responsible for providing prospective clients with insight into the ways technology innovation and Océ Business Services'

unparalleled expertise in document process management can drive cost-effectiveness, productivity and quality.

For more than 20 years, Mr. Kleuser has held various senior-level marketing and sales management positions at Océ -USA and Océ Printing Systems USA including Vice President of National Accounts for Océ Printing Systems USA, Vice President of Sales Operations for Océ Document Printing Systems, Director of Marketing for Océ from 1992 to 1996, and various field sales positions with Océ -USA from 1984-1991. Prior to joining Océ -USA, he served in sales positions for Alexander & Alexander Corporation and the Xerox Corporation.



**Stephen Mackay, Chief Financial Officer**

Stephen Mackay joined Océ Business Services in April of 1991 as Vice President, Finance and Administration. In his current role as Chief Financial Officer, he is responsible for leading the company's finance, accounting and information technologies functions as an integral member of the company's executive management team.

Prior to joining Océ Business Services, Mr. Mackay was Vice President of Finance and Administration and CFO for Ameriscribe Management Services, now part of Pitney Bowes Management Services, where as a member of the company's executive management team, his 10 year career included responsibilities for finance, administration, accounting, information technologies, risk management and procurement. Prior to joining Ameriscribe, he worked in the corporate finance department of Curtiss Wright Corporation, where he was responsible for operational audits and financial analysis of its operating units.

Mr. Mackay received a bachelor's degree in commerce, majoring in accounting, from Rider University, and an MBA with a concentration in accounting and taxation from Fairleigh Dickinson University.



**Andrea Oriel, Chief Human Resources Officer**

Andrea Oriel joined Océ Business Services in 2003 as Vice President, Human Resources, acting as a key business partner providing solid leadership, fostering teamwork, communication and change agent skills. As a member of the company's executive management team, she is part of the planning

and execution of the company's strategic plans and use of Human Resources services. Oriel designs and develops programs to enhance organizational performance by formulating policies and implementing plans in a range of areas.

She joined Océ Business Services from MasterCard International, where her career spanned 17 years of strategic responsibility and increasing levels of leadership in Human Resources. As Vice President of MasterCard's Global Products Division, Ms. Oriel had a generalist role, and was responsible for managing HR policies, compensation and benefits, recruitment and career development. On an international assignment, she headed HR for Europe, Middle East and Africa.

Ms. Oriel received her bachelor's of arts degree from the University of Buffalo, holds certificates as a Retirement Plans Associate and Groups Benefits Associate, and is a member of several HR Societies.



**Michael Scordino, Vice President of Administration & Chief Legal Officer**

Michael A. Scordino assumed the position of Vice President, Administration and Chief Legal Officer for Océ Business Services in September 2005 in a position created to focus additional executive resources on administrative and legal functions. Mr. Scordino provides leadership in the areas of purchasing and strategic sourcing, facilities, travel, population management and legal matters, and is responsible for coordination between Océ Business Services and the Océ operating companies for pricing, logistics and general business issues.

In 1999, he was appointed Senior Vice President and Chief Legal Officer at Océ-USA Holding, Inc. Prior to joining Océ, he was Corporate Counsel for Siemens Nixdorf Printing Systems, L.P, the position he held at the time of Océ's acquisition of that company in 1996.

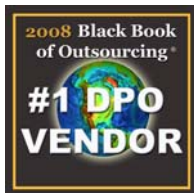
Mr. Scordino joined Nixdorf Computer Corporation upon graduating from Boston College with a bachelor's of arts degree in economics. In 1989, upon earning his J.D. from Suffolk University, he joined Nixdorf's legal department as Counsel and continued in that role for Siemens Nixdorf Information Systems after Siemens acquired Nixdorf in 1990. Mr. Scordino is a member of the Massachusetts Bar Association and the Association of Corporate Counsel.

## OCÉ BUSINESS SERVICES INDUSTRY AWARDS & RECOGNITION



### IAOP GLOBAL OUTSOURCING 100

Océ Business Services was named a top-ranked Leader in the prestigious International Association of Outsourcing Professionals' (IAOP) 2009 Global Outsourcing 100 list for the third straight year. This list defines the standard for excellence in business process outsourcing service delivery. "Each year the competition to be named to the top 100 companies continues to reach higher levels," said Jagdish Dalal, managing director, thought leadership, IAOP and chairman of the judges' panel. "Getting named to The Global Outsourcing 100 is a great recognition, particularly given the strong competition, and these companies should be proud of achieving excellence in the field"



### 2008 BLACK BOOK #1 DPO VENDOR

Océ Business Services has been ranked the No.1 document process outsourcing (DPO) vendor for the second straight year and named to the prestigious "50 Best Managed Global Outsourcing Vendors" list by the 2008 Black Book of Outsourcing annual user survey. Océ Business Services was ranked No. 1 on a list of 20 top global DPO vendors. Rankings are based strictly on responses from client surveys. According to Scott Wilson, Partner, Brown-Wilson Group and co-author of The Black Book of Outsourcing, "Océ Business Services ranked among the top suppliers due to its continuous focus on customer satisfaction in document process management services. The company's ability to successfully engage and manage outsourcing relationships is recognized by Océ clients."



### SOCHA-GELBMANN TOP PROVIDER

The Records, Compliance and Legal Solutions (RCLS) division of Océ Business Services has been named by the 2008 Socha-Gelbmann Electronic Discovery Survey as a top-ten eDiscovery provider based on production; a top-twenty provider based on experience; and a top-twenty provider based on capacity. The 2008 Socha-Gelbmann Survey rankings are based on a detailed evaluation of over 300 qualitative and quantitative factors. Its high rankings underscore the RCLS division's status as a leading provider in a dynamic and growing market.



### **MARCOM CREATIVE AWARDS**

Océ Business Services received sixteen 2007 MarCom® Creative Awards for its successful integrated marketing campaign. Four Platinum Awards, seven Gold Awards and five Honorable Mentions were received for work that included its new web site [www.obs-innovation.com](http://www.obs-innovation.com), Océ Universal Fleet Management launch advertising, trade show exhibit and other campaign ads and brochures. The MarCom Awards is an international competition that recognizes outstanding achievement by marketing and communications professionals. In 2006, the company received three Platinum Awards, four Gold Awards and one Honorable Mention for campaign advertisements, corporate brochures, a corporate product and services brochure and internet micro site. Other winners include American Express, FedEx, and IBM. The international competition attracts over 5,000 entries.



### **SUMMIT MARKETING EFFECTIVENESS AWARDS**

The Summit Marketing Effectiveness Awards (MEA) competition judges marketing communications based on the premise that their goal is to change, influence, or reinforce the target audience's knowledge, attitudes and beliefs. Our products and services brochure won a 2008 MEA award, as did our web site, [www.obs-innovation.com](http://www.obs-innovation.com). Our corporate capabilities brochure and our fleet management brochure were recognized as finalists in the 2008 competition.



## **HERMES AWARDS**

Océ Business Services has received two 2009 Hermes Creative Awards: a Platinum Award for its magazine advertisement for the Océ MAX™ Advanced document performance management system, and a Gold Award for its brochure on Océ MAX. The Hermes Creative Awards program is an international competition that recognizes outstanding achievement by creative professionals. The awards for the Océ MAX ad and brochure reinforce the growing importance of performance management of outsourced document processes. In a survey report issued by Océ Business Services earlier this year, a majority of survey participants indicated that their companies are indeed measuring document performance management, including such elements as productivity and document processing timeliness and accuracy.



## **COMMUNICATOR AWARDS**

Océ Business Services received four Communicator Awards in 2007. The Communicator Awards is an international awards competition with a 13-year history that honors outstanding work in the communications field. Océ Business Services received an Award of Distinction, the highest honor, for its records management brochure. The Award of Distinction is bestowed on projects that exceed industry standards in quality and excellence. Three Honorable Mentions were received for its corporate capabilities brochure, corporate products and services brochure, and eDiscovery and Litigation Support division brochure.



## **VFI EMPLOYER OF THE YEAR AWARD**

Océ Business Services was named Employer of the Year by Vocational Foundation, Inc. (VFI) in 2006. Océ was honored with the award at the foundation's graduation ceremonies in New York after hiring 40 VFI graduates in the past year. New York City-based VFI provides vocational and literacy training to young adults from the tri-state area who were unable to complete high school and so do not have a high school diploma, GED or other equivalent educational degree.