



**Market Brief: OnBase ECM**

Market Description: Hyland OnBase is a comprehensive Enterprise Content Management (ECM) solution, primarily suited for mid-sized to large enterprises, typically those with revenues exceeding \$50 million. It is widely adopted across several key verticals, including **healthcare, government, higher ed, and financial services**. These industries benefit significantly from OnBase's capabilities in document management and workflow automation to streamline information handling and enhance operational efficiency. OnBase is an ideal choice for organizations looking for a scalable and customizable platform to support complex, content-driven processes.

Criteria	X Market
Market Size/yr in US *	<ul style="list-style-type: none"> <li>• 2023: \$32.8B with a CAGR of 16.1% projected through 2030.</li> <li>• 2024: Approximately \$44.25B</li> <li>• 2025: Approximately \$51.38B</li> <li>• 2026: Approximately \$59.65B</li> </ul>
Service Needs in the Market	<ul style="list-style-type: none"> <li>• Cost containment, especially maintenance costs and overhead due to complexities. Supplier unification and other initiatives descend from this need.</li> <li>• Highly secure, robust, and audit-friendly software tools that align with industry certifications (SOC-2, NIST, HIPAA, SarbOx etc) with minimal or no onsite hardware requirements. Regulatory concerns are paramount.</li> <li>• Intelligent automation of repetitive tasks to increase speed and reduce errors, or to reduce employee count, feeding back into cost containment</li> <li>• Enterprise-wide tools with benefits and usage across department boundaries (HR, AP and supply chain using a shared tool rather than a bespoke tool for each, for instance)</li> <li>• Solutions designed for companies that bring in onsite consultants as part of their normal strategy; ease of use is critical but ease of configuration, less so.</li> <li>• Solutions that can be integrated non-disruptively by companies that grow by acquisition</li> <li>• Top concerns consistently named are cybersecurity, staffing shortfalls, leveraging new technologies (AI/ML out front, Blockchain and Big Data in the rearview)</li> <li>• The market is not uniformly saturated. While some businesses and agencies have fully embraced ECM technologies, others still have significant room for growth and adoption. The market potential often depends on factors like available funding, the urgency of digital transformation needs, and the presence of champions within the enterprise or government agency who understand and advocate for the benefits of ECM.</li> </ul>
3SGPlus Position in the Market  Existing Clients  Net Revenue in 2023 Forecast Yr End  Potential with Existing Clients for 2024	<div style="background-color: black; height: 20px; width: 100%;"></div> <div style="background-color: black; height: 20px; width: 100%;"></div> <div style="background-color: black; height: 20px; width: 100%;"></div> <div style="background-color: black; height: 20px; width: 100%;"></div>
Market Pricing Multiplier Target/Range Pricing Strategy	Cost-Plus pricing model except OnBase license price and margin for net new customers largely dictated by vendor. Professional Services prices based on rates for projected development hours, onsite personnel placement through OST. Scanning rates based on scope hours, transportation and other costs.
3SGPlus Target Services	<ol style="list-style-type: none"> <li>1. OnBase new Licenses + Professional Services</li> <li>2. OnBase Dedicated Onsite Consultants (tech resource augmentation)</li> <li>3. OnBase Services + DX (scanning/imaging, PODS-DX)</li> </ol>
3SG Plus Differentiators	<ul style="list-style-type: none"> <li>• Total solution: front end (scanning) and backend (infrastructure) service lines in addition to licenses, maintenance and professional services</li> </ul>

	<ul style="list-style-type: none"> <li>• 17+ years experience</li> <li>• Complex Case Management + other success stories</li> </ul>
New Target Clients	[REDACTED]
3SG Plus Target Geographic Location	US market, national scope
Competitors	IDT, Data Management Resources, GLADiiUM Technology Partners, Workflow Strategies, Naviant, KeyMark, All Star Software Systems, VeBridge, TechLine Communications, Paperless Solutions Incorporated, DTI, RedMark, many others
Competitor's Strategies	Specialization on 2-3 verticals; 'standardized' add-on products rather than open-ended services in some cases.
Barriers to Entry for 3SG Plus	Difficulty in creating branded add-on products that get limited attention; Saturated new license market in financial and higher ed verticals; Unclear RFP policies/Vendor considers RFP responses to be poaching; selling against vendor direct
3SG Plus Sales/Investment in 2024	Marketing Investment Direct: (specific events, media valuable for OnBase only, etc): [REDACTED] Proportional value in shared messaging (3/10 of remaining budget) = [REDACTED]
3SG Plus Sales/Investment in 2025	Marketing Investment +15%; Direct [REDACTED] Shared [REDACTED]
EEC Sales/Investment in 2026	Marketing Investment +15% Direct [REDACTED] Shared [REDACTED]
Marketing Initiatives to Penetrate or Build the Market	<ol style="list-style-type: none"> <li>1. Manual and automated monitoring of RFP sites for OnBase projects (ohiobuys, city of Columbus, Cincinnati, Cleveland, Franklin Cy, Cuyahoga Cy. Etc; SAP Ariba, Coupa, Tradeshift, etc)</li> <li>2. Email and social campaigns (webform CTA) tied to OnBase cobranded content</li> <li>3. Awareness/Branding/Direct Response advertising (digital/content/native) in Bizjournals (5 markets), digital GovTech/eRepublic, ColumbusCEO</li> <li>4. Media Events (Bizjournals, OnBase, ODGS) as well as closed-audience Webinar event(s) co-hosted with OnBase</li> <li>5. Automation to seek out companies newly cresting the \$50M mark in size or companies that have merged/been acquired to form an entity larger than \$50M</li> </ol>
Sales Initiatives to Penetrate or Build the Market	<ol style="list-style-type: none"> <li>1.</li> </ol>

\* Sources:

- [Report: Enterprise Content Management Market Size to Surpass USD 106.26 Billion by 2030](#)
- [Global Enterprise Content Management Market, Forecast to 2024 \(researchandmarkets.com\)](#)