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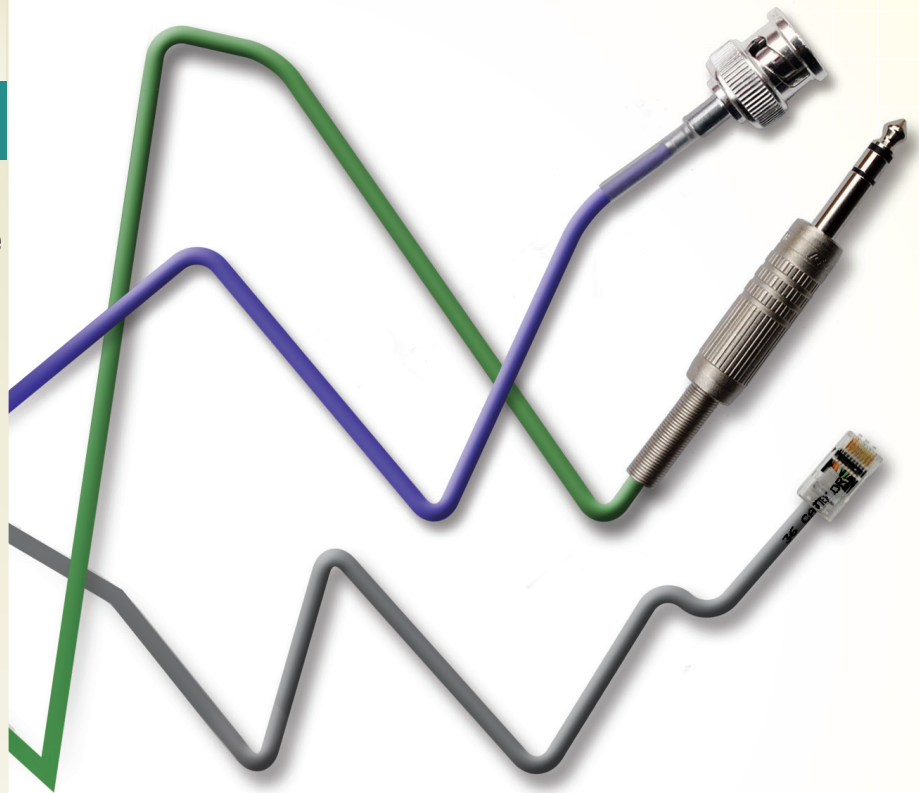
Business Trends Report

Issue 3

How the Internet Impacts Pro AV

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- ▶ Spotlight interview with an integrator leading the online charge
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□ ***The advent of the Internet marks the biggest cultural shift since the introduction of television.***

The Internet is a powerful driving force that is reshaping our industry.

The Internet is all about collaboration, communication, knowledge-sharing and dissemination. These key concepts are also defining and shaping the vision of private enterprises, government agencies and educational institutions. The Internet has become an essential tool and presents many untapped opportunities for AV companies.

IT companies have been largely responsible for introducing many of the online tools that are available today, so it is no surprise that IT professionals have proactively used these tools to grow their businesses. The following tools are commonplace activities at IT companies:

- Live chat for pre-sale and post-sale inquiries
- Online Catalogs
- Social Media Marketing
- Online Communities
- Blogs
- Online Recruiting
- Video and Audio Resumes



There has been a major shift in a customer's decision maker away from the AV Manager to the IT manager. IT Managers are very clear that they expect to communicate in their own language and online tools have become the lexicon, as we confirmed in the 2007 AV/IT Quarterly Business Report.

IT convergence is driving acceptance of online tools toward a new industry standard.

There are many online tools available that offer considerable ROI; however, there has been a very low adoption rate by AV companies in comparison to their IT competitors. Creating a website is no longer a complete web strategy.

Our objective with this information is to open a dialogue among the InfoComm members about issues that make a difference to the AV industry. We hope this report on the Internet and Social Media starts a discussion on this significant topic.

Julia Pegg

Project Manager
Acclaro Growth Partners

The following are key insights from a conversation with Mike White, President and Owner of Multi-Media Solutions, Inc. a leading AV integration company based in Alcoa, TN.

JP: We are ultimately taking a look at how pro AV professionals can use the Internet to grow their businesses, but starting with the big picture, how has the Internet impacted the pro AV industry?

MW: I do not believe that we have seen the major impact of the Web yet; I think it will continue to increase monumentally in its influence and power.

The AV industry was impacted first by making it easy to sell boxes to customers online. In 1998 through 2002, the power of the Internet was just emerging and customers did not have a huge number of choices where to buy AV products online. Today there is so much competition that if an AV integrator is relying on selling commodity type products such as flat panels or projectors they are being impacted by shrinking margins that are almost nonexistent.

My business has been impacted directly by shrinking box sales. In the early 2000s, we were making millions of dollars selling flat panels online as a result of our early dominance on the Web. Today, because of the way the market has evolved with the Best Buy's and Circuit City's embracing this segment of the market, I scarcely sell any products on the Web.

If anybody is going to survive long term in the AV industry, they will constantly have to reevaluate and morph their business so that it complements what is happening on the

Web. I think this is such a driving factor that companies that are not invested in, or are in denial about the power of the Internet, will eventually have to succumb to the reality that it is no longer a level playing field. It is no longer enough just to do a good job; you have to be good and you have to be able to communicate that.

JP: I regularly hear from AV professionals that one of the greatest challenges we face as an industry is communicating the value that AV brings to the table. Do you think the Internet can help us communicate this message?

MW: Yes, we as AV companies need to raise the level of our professional communications by using the Web to explain to people why they need an AV integrator and some of the pitfalls they may face if they don't use an integrator.

The challenge is how the industry should use the Internet to explain to potential end users exactly why they should not just buy products from a box house. No disrespect to the box houses; they have an important place in the economy. When it comes to installing a digital signage network, videoconferencing for a boardroom or a number of other applications, this is where an AV integrator is in the best position to add value and support that customer.

But we need to educate the customers about the value we add and the Internet provides a means for us to do so.

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JP: As an industry, I don't think we have scratched the surface of using the Internet as a tool for supporting customers or for teaching and training. Does your company use the Internet for any of these activities?

MW: We have used YouTube for training videos, which has proven very useful when there is something that needs to be both seen and heard. We can now video a process and upload it to YouTube for others to see. YouTube acts as a host so that individuals do not have to download video in order to view it. Of course you can send video in any number of ways, but the Internet provides a structured way of getting information to a targeted audience.

I regularly lead training sessions on digital signage and in the past I have relied on putting the video content up to a streaming server at the location where the training is taking place. This is still a great solution but it requires that the training site have a sufficiently developed infrastructure. With YouTube, I only need an Internet connection at the training site in order to view my training videos.

I am also getting ready to publish a video with key elements of that coursework and will use the power of the YouTube environment as a means of inexpensively making it available to the masses.

JP: What are some of the other elements of your web strategy?

MW: When I have meetings with other AV companies and I ask them about their web strategy or their Google rankings for their page, they look at me without a clue as to what I am asking. Then they ask me how I got the opportunity to do a digital signage installation in a city that is not close to my office in Alcoa, TN, as if it is some kind of magic. I have been embracing the Internet as a tool for many years and it has helped me grow the business far beyond my geography.

We have a strong reputation for wireless digital signage and if you do a Google search on that topic the likelihood is very strong that Multi-Media Solutions will come up as one of the first five or six listings. Google and Yahoo use algorithms to rank pages by their relevancy and because this is a moving target, we are always doing what we can to make sure our page maintains a high ranking.

I have attended many symposiums to learn how the search engines calculate the algorithms that determine rankings, which have helped me develop an understanding of how to raise my Google ranking. This strategy has brought us customers from across the U.S., which has been necessary to grow the business beyond what would have been possible by just focusing on our local market.

It is a fact that the likelihood of today's graduates looking up a company in the physical yellow pages is almost zero. Conversely, the chances are 100 percent that same group will use their cell phone or computer to find the information they seek.

Spotlight Interview (cont'd)

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For us as AV integrators, to ignore the dynamic tools that are out there to increase our presence is not a good strategy. Too many AV companies are ignoring the Internet as a tool, or choosing not to use it; at some point their business will suffer if it hasn't already as a result of them not embracing these tools.

JP: Let's go into more detail on the power of the search engine and why it is not enough to just have a website.

MW: When a prospect is interested in learning about a topic, take digital signage for example, they typically start with a Google or Yahoo search. Because AV integrators for the most part have not invested in the tools available on the Internet, the search puts AV integrators lower down on the list than their IT counterparts who have invested in a web strategy. The user's perception is that companies higher on the list are "better" at digital signage.

Prospects will reach out first to companies near the top of the list and companies that do not come up on the first page of search results stand a very low likelihood of catching a prospect's attention.

JP: So a higher search engine ranking will essentially drive prospects to your business?

MW: Yes, and once an IT company has engaged a prospect, they are more likely to win the sale. However, the danger is that these IT professionals are looking to engage in a highly complex, most advanced form of

audiovisual integration, and they very likely do not have the resources or collaborative talent required to put everything together that a customer will need.

The end result is that about half of all digital signage applications fail partly because the AV integrator did not make themselves easy enough to find when prospects were looking for digital signage companies.



JP: The consensus is that AV is better suited than IT to serve the digital signage market, yet IT dominates that market. Would you agree that IT's willingness to embrace the Internet as a tool in a way that AV has not is a contributing factor to their dominance?

MW: Yes. It is our own fault that we have not embraced these tools, and regrettably this is because most AV professionals are not looking past the reality of today. Right now, we are blessed as an industry in that if you do good work and you have good references, your business is extremely busy. I don't know of any pro AV integrators worth their salt who are not incredibly busy and having a hard time keeping up with the opportunities that are out there.

Spotlight Interview (cont'd)



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But the market is cyclical; it will not always be this way and most AV companies do not have a strategy for how they plan on dealing with tomorrow.

JP: Most AV Integrators I have spoken to are so busy going from one job, to the next job, to the next job, that they don't make it a priority to do strategic planning for the future.

MW: Maybe today you can be successful and afford to ignore the Internet as an essential tool, but it will not always be this way and when the market transitions, those AV companies that have ignored the Internet will be behind the eight ball.

We should be building our future businesses today by engaging in the tools available to us through the Internet. It takes time to build Google rankings and you have to be out there to establish yourself. This doesn't happen overnight.



End User Sources of Information

□ ***The Internet has become the primary source of information for end users.***

In the past, end customers looked to AV dealers and integrators as their clear primary source of information. It was a shocking result of InfoComm's member survey for the 2007 North America MDSS that dealers and integrators have slipped to the sixth most influential source of information for end users.

TOP END USER SOURCES OF INFORMATION

- 1 – PEERS
- 2 – TRADE SHOWS
- 3 – INDUSTRY WEBSITES
- 4 – MAGAZINES
- 5 – DOCUMENTATION
- 6 – AV DEALERS AND INTEGRATORS
- 7 – AV CONSULTANTS

With the convergence of AV and IT, there has been a major shift where peers and industry websites have become the primary sources of information, followed by magazines and trade shows. Three years ago, blogs were mentioned as the worst way to communicate with end users, but IT convergence is rapidly driving their acceptance. In the last 12 months, blogs have gained significant popularity becoming a common method for end users to exchange information.

IT decision makers routinely collect information for their IT purchases through peers, websites and blogs. With IT as the new decision maker for AV purchases, it's important to understand how this changes the way information can be sent and received and more importantly how we are going to react to that change.



□ ***With the advent of social media, consumers have become contributors to brand messaging as opposed to only passively receiving communication from marketers.***

The Internet has lowered the boundaries for sharing information so now all customers have the power to publish their opinions – both negative and positive. It used to be that the only customer information available to prospects was positive customer references; now customers and prospects can communicate directly without the corporation as a filter.

Ultimately, conversations about AV are going to take place online whether the industry participates or not. It is up to the industry to become part of the exchange. At one end of the scale, the industry can be the facilitator and guide the discussion. At the very least the industry should listen.

Social Media Marketing



❑ **Social media is more about pull marketing rather than push marketing; you cannot force information onto people.**

Social Media Marketing refers to the creation and distribution of content via the Web.

Social media can create a “buzz” about AV. This can be anything from creating compelling content that gets bookmarked, to putting videos on YouTube, to participating in online communities with customers, or to contributing to blogs.

Top 10 Social Networking Sites in the U.S. for October 2007

Site	Membership (000s)
Myspace.com	58,843
Facebook	19,519
Classmates Online	13,278
Windows Live Spaces	10,261
AOL Hometown	7,923
LinkedIn	4,919
AOL People Connection	4,084
Reunion.com	4,082
Club Penguin	3,880
Buzznet.com	2,397

Source: Nielsen Net Ratings, November 2007



The top 10 social networking sites in the U.S. all target individuals, but these sites are evolving as corporations become interested in participating. For example, on Facebook, only individuals can post a profile. However, the Facebook Platform enables business to create applications that let users interact with their friends and other businesses. These applications could include, but are not limited to, online communities, blogs and catalogs.

❑ **InfoComm International has created groups on Facebook and LinkedIn so members can expand their professional network using the popular social networking sites.**

When individuals join InfoComm’s Facebook group they can connect with individuals around the world that are interested in the audiovisual industry. The LinkedIn group allows InfoComm members to grow their online professional network by connecting with other InfoComm members. Both social networking tools help members increase their connections with others in the industry. In 2008, InfoComm will be expanding its social media program, creating more communities within the AV industry.

□ **Adoption rates of social media by corporations are predicted to increase rapidly in 2008.**

Many AV professionals admit that they do not know much or anything about social media, and there are just as many who are interested but don't know how to use it. However, there are very few AV professionals remaining who do not believe in the value that a social media strategy can bring to a business.

While AV companies have been more reluctant than their IT counterparts to leverage social media, the tide is starting to turn. Many of the AV companies interviewed for this report indicate that they will have a budget for social media marketing in 2008, even those that have yet to use social tools in their organization.



□ **The Internet presents a means to communicate the value of AV professionals.**

One of the greatest challenges the industry faces is communicating the value that AV brings to the table. Social media provides an excellent stage to carry that message to potential consumers. Magazine articles, white papers, press releases and other forms of communication can be easily disseminated through social media.

Press releases and news are good tools to grab prospects' attention. For higher visibility videos can be posted on YouTube and not just on the corporate website.

□ **Thought leadership from AV experts will elevate our industry and give us more credibility as professionals.**

Many AV integrators report that they can lose a contract "in the blink of an eye" if they cannot communicate their value to the IT decision maker in a language that IT understands. It may be beneficial for the AV industry to educate IT decision makers at the beginning of their decision making process as to why they need AV professionals. As IT Managers increasingly refer to online communities and blogs for information on AV purchases, it makes sense for the AV industry to use this same medium for self promotion.

❑ ***Make it easy for people to share your content.***

By adding active linking functionality such as Digg, Delicious, RSS Feeds and Email to your website, you can encourage people to share your content while making it easy for them to do so.

Email functionality is the most common tool used, allowing users to send your content via email to chosen recipients. Digg is a site where people can send content from anywhere on the Web. Delicious is a bookmarking and sharing site. There are numerous other websites that have been created for the purpose of sharing content. Typically, these websites include mechanisms to allow users to vote on content which makes items submitted by users more or less “popular.”

The Internet is very well suited to showcasing AV products and services; it is like a brochure, only better, because you have the capability to zoom in, add streaming media and other effects you cannot achieve in a static brochure.

Some AV companies that have used these techniques on their websites report finding their content on sharing sites because a visitor to their site knew if he “dugg” it then his friends would “digg” it, too.



For example, IO2 Technology, manufacturer of the heliodisplay, achieved their first publicity through the Internet with the Digg, Wired and Slashdot crowd. IO2 Technology was not around five years ago, and their very existence is a result of peers, industry websites and online communities giving them visibility on the Web.

IO2 Technology has successfully conveyed the “wow factor” of their product on the Web, and individuals who view the content are compelled to share it with their social network.

These activities will drive traffic to your website, increase the number of links to your website, help raise your search engine rankings and boost attention to your business.

□ Blogs were first accepted by individuals, but corporate blogging is driving the next wave of social media adoption.

A blog is an informal conversation where businesses can participate in the discussion about their market. Business blogs should discuss topics that are relevant to the audience and address user needs.

To have a successful blog does not mean you need to have the whole world linking and reading your blog; it is about connecting with the right audience.



□ Blogs are The King of social media.

For AV companies wanting to enter the world of social media, blogging is a good place to start. Blogs have lower barriers to entry compared to online communities which take more time and effort to establish. This is driving acceptance at corporations where blogs are increasingly used for internal and external communications.

There are three main reasons why AV companies interviewed for this report do not yet use a blog:

- Business owners are unsure of the benefits.
- There is a belief that the costs are too high in comparison to the benefits even if the costs are unknown.
- Maintaining enthusiasm for the blog deployment can be challenging.

For companies concerned about the costs of blogging, there are free sites such as Yahoo where anyone can start a blog so your only cost is your time.

If you are going to start your own corporate blog, it is important to realize that blogs are search engine “positive” (i.e., can improve the rank of your site on search engines). So remember to register your blog with indexers such as Google and Yahoo.

For individuals who have never blogged before it can be overwhelming and difficult to know where to start. The best way to become comfortable with this medium is to jump in and learn by doing. Try doing a search for AV blogs, AV technicians, or your area of interest, and see where it takes you. Getting involved is truly the best way to familiarize yourself with social media.

Online Communities

❑ **One of the main goals of social media is to bring together people with common interests.**

Online communities are made up of individuals and organizations that have come together because of a common interest. For example, on MySpace there is an AV Technicians Group. To date, there are 54 members in this group and their mission is to keep each other informed on cutting-edge technologies. So in one click of a mouse, the nearly 60 million members of MySpace in the U.S. are narrowed to 54.

When InfoComm created their Facebook and LinkedIn groups, an email was sent to members informing them about the groups and how to join. Within days hundreds of individuals had joined each group. These individuals were already participating in Facebook and LinkedIn and the InfoComm group was an additional connection they could easily make to enhance their network.

There are numerous other social networking sites that offer user-created communities, and AV companies are certainly welcome to participate, but it is also possible to add a community to your corporate website.

Building a managed community on your web site gives you more control over the interaction and exchange of information between visitors. User-created groups tend to be a bit more disorderly compared to managed communities on corporate websites.

❑ **Interaction between community members builds a network between people with similar interests who will hopefully keep coming back to your website.**

An online community will make your website more dynamic and interesting because there is more varied content. You do not have just one moderator creating content for the site, but rather many people joining in with their opinions and feelings. The most successful online communities allow members to share knowledge, learn from each other and share best practices, which will ultimately optimize their experience.

Communities add a sense of belonging to a website, which can encourage repeat visits and more interest in the site as a whole. Online communities create personal relationships with the members. This can help get information rapidly disseminated, as well as increase visitor traffic to your website through word of mouth.



Magic Planet available from Global Imagination

From the customer's perspective, an online community adds great value during the decision making process. Peers have replaced the systems integrator as the number one end user source of information, and online communities provide a forum for prospects to find the information they seek.

Online Communities (cont'd)

□ *Online communities are commonplace in IT and not as prevalent in the AV world, but this is changing.*

Some of the largest AV companies have the best known user groups in the industry. For example, Polycom User Group (PUG) was founded in 2002 with a focus on providing educational and peer networking in the Conferencing industry; in late 2007 Crestron launched the Crestron Owners Group (COG).

Crestron found that their customers were already communicating with each other so Crestron created COG to facilitate communication. The objective was to offer a safe environment without solicitation where customers can be open and honest. There are already over 160 members and this number continues to grow.

Crestron employees are not permitted to post on the site, but the company has a Chairperson to monitor and manage activities. R&D will be monitoring the site to stay informed on what customers like and what problems they are having. This kind of input from the community is invaluable for product development.

The website is only one component of the COG community; the next step is in person meetings. Customers, especially in higher education, are asking to meet in person so the first national meeting is taking place at InfoComm 08.

Manufacturers can easily bring their customers and dealers into the product development process and enlist members for beta testing.

All of the AV manufacturers interviewed that operate online communities confirm that the value of the feedback received from customers far outweighs the costs of operating the community. Manufacturers can find out directly from the market how their products are working in the real world, and this information allows manufacturers to better respond to customer and distributor needs.



You do not need to be a large manufacturer to benefit from an online community. Some of the youngest and fastest-growing AV manufacturers have embraced the tools available to them on the Internet because size is not a barrier to entry on the Web.

□ *Online communities are a valuable means of reaching prospects globally.*

AV companies that are pursuing global markets rely on the Internet to communicate with foreign prospects. Often people who are not comfortable speaking English will feel more comfortable communicating online. This could mean looking at photos and videos on a website, participating in an online community, or sending e-mail. Electronic communications are frequently easier for a non-native speaker than calling or speaking in person.

Online Communities (cont'd)



There is more than one way to build an online community. Features to consider for your website:

Newsgroups / Bulletin Boards	Chat Rooms
<p>Newsgroups are the most common method of creating an online community. Typically, visitors will start by browsing the content and once they feel comfortable, proceed to submitting their own posts. Postings remain on the bulletin board so members can browse and respond at their convenience.</p>	<p>Chat rooms allow community members to interact in real time. The primary benefit of chat rooms is the immediacy that it gives to members. However, the downside is that members need to be available at the same time. Unless there is a scheduled time for members to log on, it can be challenging to build a successful chat room.</p>
Newsletters	Calendars
<p>E-newsletters are effective in keeping your readers informed about your business and the AV industry. You can use newsletters to cover new product features and changes, and generally provide information to recipients.</p>	<p>One of most underutilized yet easiest tools to implement, calendars keep people informed with a list of events and dates, chat room schedules, trade shows, and educational forums.</p>



Recruiting



❑ **The AV industry has to find new ways of presenting itself as a career opportunity.**

One of the most common concerns across the AV industry is how difficult it is to find good people, yet AV professionals can do more to attract them.

The Internet presents a means of communicating with the next generation that is largely untapped by AV as an opportunity. Many senior AV executives are resistant to social media, but as you strive to get the next generation interested in AV, you will have to communicate on their level and use social media networks as a tool.

❑ **Social media networks are the new frontier for recruiting.**

The possibilities for connecting have evolved far beyond job boards that were the first recruiting tools on the Internet. From the recruiters perspective, numerous options have evolved for reaching out to prospective candidates. From the candidate's perspective, the means for declaring one's availability and competence are enormous.

Blogs, communities, podcasts, video blogs, video interviews, video resumes, audio resumes and networking tools offer amazing possibilities. The number of recruiting blogs is over 500 and the number of individual contributors is in the millions.

LinkedIn is an online network of more than 20 million professionals from around the world, representing 150 industries. When you join, you create a profile that summarizes your professional accomplishments. Your profile helps you

find and be found by former colleagues, clients, and potential employers. LinkedIn is growing at a faster rate than any of the other top 10 social media networks and has developed a strong reputation in the professional networking/ recruiting / job search space.



❑ **Putting a face to the resume.**

Technology innovations have really lowered the barriers for job seekers. Today, you can apply for jobs that you are only marginally qualified for because there is no cost. As a result, recruiters are getting many applications from unqualified applicants, so they need a process which helps them be more efficient, and video resumes present a solution.

A new generation of tech-savvy job seekers is turning to video resumes to help market themselves. For example, the recently introduced MyResumeSpace.com is an interactive community that turns resumes into a first job interview. The advantage is that you can see more people than if you relied on phone interviews and you are going to get an initial sense of their communication skills.

Customer Support

❑ ***It is very clear that preferred methods of communication vary by generation.***

The next generation is driving acceptance of electronic communications, so there is a rise in online chat, text messaging and e-mail notification.

The average age of the AV professional is considerably higher than the next generation entering our industry, so it is no surprise that AV companies have been slow to adopt new methods of communicating.

A common complaint from AV professionals is that they feel uncomfortable using live chat or text messaging and prefer the immediacy of hearing a voice on the phone, so this is largely how the AV industry operates.

If IT companies are starting to tread on what AV considers its traditional territory and IT is offering live chat to communicate with customers, it is important to examine if you should follow.

Most AV companies prefer the telephone for customer interactions, but customer preferences are changing. With IT Managers as the new decision maker for AV, there is increasing interest in online communications for AV inquiries.

If customers want to communicate with AV vendors online, AV professionals should make it possible.



❑ ***Live Chat offers opportunities for initial sales inquiries and technical support.***

When members of the next generation are online researching IT and AV purchases, it feels perfectly natural for them to e-mail an initial inquiry to the vendor as opposed to picking up the phone.

The same dynamics also apply to post-sale technical support. More complex issues may result in a phone call, but the next generation is very comfortable initiating contact online.

As an AV company transitioning over to online communications, the primary difference is that you will be answering questions electronically instead of verbally.

Many AV companies are concerned about costs of implementation. The perception is that a new person will have to be hired to monitor the system. However, if the same person handles telephone inquiries there should be no additional staff required.

❑ **Online catalogs have been readily embraced by the AV community.**

Traditionally, AV companies have always made print catalogs. Many systems integrators report spending \$10,000 to \$50,000 per year on print catalogs in addition to their time.

There has been considerable return on investment for providing this resource to customers and many catalogs have been well-used even when they are out of date. Customers report that they use catalogs to gather information and increase their knowledge prior to talking with a salesperson.

However, from the systems integrator's point of view, there are many limitations to print catalogs.

The typical integrator represents more than 250 manufacturers and more than 25,000 products. You can fit a maximum of 20 products per page, which means a 500 page catalog can only showcase 10,000 products. For this reason, print catalogs rarely include an integrator's full product offering. These limitations have been eliminated by the Web as integrators transition to online catalogs.



❑ **The Internet has made electronic catalogs possible, and as a result paper catalogs are disappearing.**

It is much easier to keep an online catalog current, so customers are not referring to an out-of-date version.

It is also much easier to reach a broader audience online. There are likely multiple decision makers at a customer's business, but if they only have one copy of a catalog, has everyone had a chance to take a look? The Internet eliminates this obstacle.

Customer response to online catalogs has been extremely favorable. It is more straightforward for customers to navigate online with keyword searches, whereas they were previously restricted by an index.

All systems integrators do not have the resources to manage their own catalog program, and for this group InfoComm's IQ is an excellent resource. IQ represents 600 manufacturers with 100,000 products and receives 130,000 unique visitors each month. In 2007, IQ facilitated 35,000 business connections.

❑ **Online catalogs can be used for internal and external purposes.**

Some AV companies have introduced internal versions of their catalog. Internal versions typically contain information that is not intended for customers, yet useful as a sales tool. For salespeople in the field this represents an excellent resource.

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