AIIM Market Intelligence

Delivering the priorities and opinions of AIIM's 80,000 community

Information Management
- State of the Industry 2016

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As the non-profit association dedicated to nurturing, growing and supporting the information management community, AIIM is proud to provide this research at no charge to our members. In this way, the entire community can leverage the education, thought leadership and direction provided by our work. We would like these research findings to be as widely distributed as possible. Feel free to use individual elements of this research in presentations and publications with the attribution – "© AIIM 2016, www.aiim.org". Permission is **not** given for other aggregators to host this report on their own website.

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Process Used and Survey Demographics

While we appreciate the support of these sponsors, we also greatly value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community.

The survey was taken using a web-based tool by 266 individual members of the AIIM community between January 28, 2016, and February 21, 2016. Invitations to take the survey were sent via e-mail to a selection of the 180,000 AIIM community members.

Survey demographics can be found in Appendix 1. Graphs throughout the report exclude responses from organizations with less than 10 employees. To avoid bias, we have also excluded providers of ECM products and services, taking the number of respondents to 241.

About AIIM

AIIM has been an advocate and supporter of information professionals for 70 years. The association mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and big data. AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community: practitioners, technology suppliers, integrators and consultants.

— Doug Miles, Chief Analyst

About the Author

Doug Miles has over 30 years' experience in software marketing roles and most recently spent 11 years at AIIM. Here he ran European operations before becoming VP of Market Intelligence. He has produced over 60 of AIIM's keynote market survey reports on a wide range of topics related to capture, ECM, information governance, SharePoint, mobile, cloud, social business and big data. Doug has also worked closely with other enterprise-level IT systems such as ERP, BI and CRM

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Introduction

Information management is a cornerstone of any organization, along with operations management, customer management and resource management. Managing and recording what the organization knows, what has been said, what inputs are received, what decisions and commitments have been made, and what results are achieved, is paramount to improvement and success. Failure to manage this information, and make it available for sharing, search, controlled access, defined process, audit and secure archive limits operational capability, stunts new initiatives and exposes the business to potential liabilities.

Unfortunately, this clear vision of the importance of information is not always reflected in the policies we make to govern it and the strategies to share and exploit it - nor in the deployment of the systems we use to store, manage and dispose of it. The term Enterprise Content Management (ECM) has been with us for 15 years, both as a concept, and as a description of a particular systemized set of IT tools. Many of us within the ECM world have a clear vision of how such a universal system should be applied across the enterprise, across multiple content types, and across multiple processes, managing the lifecycle of content from creation, through collaboration, distribution, process and archive, to eventual and defensible deletion. As we will see in this report, the reality is somewhat different, although the incentives to achieve this goal, and the benefits that result, have never been greater.

We will see that for some, a single ECM system deployed on a global scale combining collaboration, document management, multi-channel process and records management makes most sense, whereas for others, a 3-tier arrangement - collaboration and file-sharing; project documentation; and records archive - is more practical. Some prefer out-of-the-box ECM suites, others have customized suites for their specific industry and others combine best-of-breed applications. Many are facing user adoption issues and file-shares that simply won't go away. Others are struggling to extend the defined governance of established on-premise systems with the more open and user-friendly approach of cloud file-share-and sync services. These issues sit alongside the growing security implications of mobile, adding more fuel to the fire. It is a struggle for many to create and enforce information governance policies, and there is near universal agreement that email is still the big untagged, ungoverned, high-risk content type.

In this report we look at how different ECM system strategies match the overall goals of the information management lifecycle, and the governance and adoption issues that users face, particularly when extending access to mobile and the new cloud services. With 20% looking to buy a new or replacement ECM system in the next 2 years, and a further 15% migrating to a single existing system, change is certainly on the information management agenda for many organizations, and we look at the strategies and options for consolidation and system replacement.

Key Findings

IM Drivers and Adoption

1. **The number of large organizations citing compliance and risk as the largest driver for IM has risen sharply in the past year from 38% to 59%.** 44% of mid-sized organizations also cite this as the biggest driver whereas smaller organizations consider cost savings and productivity improvements to be more significant drivers.
2. **17% of responding organizations have completed an enterprise-wide ECM capability, including 4% on a global scale.** 23% are rolling out company-wide, and a further 15% are integrating across departments. 6% are looking to replace existing system(s) with a new one.
3. **Only 18% align their IM/ECM system strategies with agreed IG policies.** 15% have IG policies but they do not drive decisions. 29% have no IG policies.
4. **39% describe their email management as "chaotic", including the largest organizations.** 55% agree that email is their big untagged, ungoverned, high-risk content type. Only 10% selectively archive emails to ECM, RM or SharePoint.
5. **22% consider their ECM project to be somewhat stalled, and 21% have user adoption issues.** 52% admit that they are still dependent on their network file-shares.
6. **38% are actively focused on extending their ECM functionality and 25% are rolling out to a wider user-base.** 30% are improving collaboration and 21% are working on mobile and remote access.

Content Lifecycle

1. **Poor content management practices result in taking too long to find content (62%), duplicated efforts (52%) and insufficient re-use (46%).** 49% also report too many round-robin emails and 40% cite unnecessary printing.
2. **In addition to the 64% reporting chaotic file shares and 48% chaotic email, 35% feel their electronic records management is chaotic, and 34% their SharePoint.** Enterprise file share-and-sync (EFSS) and workplace social are not generally well-governed - a recipe for future chaos.
3. **Only 35% consider their non-SharePoint ECM system to be easily searchable, yet this is the best result compared to all other repositories.** 57% of those using SharePoint make it available enterprise-wide compared to 44% of non-SharePoint ECM systems.
4. **Only 22% have mobile access to ECM/RM content. 21% have mobile capture and 20% content creation and commenting.** Just 13% have process interaction on mobile. 8% are using digital signing.
5. **24% have no mechanism to limit stored content volumes, including 21% of the largest organizations.** 47% have an IG policy that defines retention periods, but 51% rely on manual deletion versus 25% who have automated deletion. 7% are using analytics tools for data clean-up.
6. **Half of organizations surveyed would struggle to defend deletions in court, particularly with cloud file-shares and workplace social, but SharePoint (40%) and email (31%) are not far behind.** Even where organizations have IG policies, half are not auditing compliance and 15% admit they are mostly ignored.

ECM Systems

1. **62% of organizations use SharePoint as a main, secondary or legacy ECM/DM/RM system, including 27% using the online version (12% exclusively online).** No other supplier has more than a 23% share of the installed base across these categories.
2. **40% describe SharePoint as their "main" system, although almost all of these consider one or more other systems to also be a "main" system.** Next highest market share for "main" system is 18%.
3. **8% consider SharePoint to be a "legacy" system, compared to between 7% and 15% of those systems traditionally described as legacy.**
4. **72% are using single-vendor general purpose suites as their main ECM systems, compared with 13% using integrated best-of-breed and 10% in-house developed.** 20% of suites are used out-of-the-box, 29% with add-ons and 25% customized for industry sector.
5. **When asked which ECM model users would adopt if changing their systems, EFSS would jump from 4% to 11%, and best-of-breed from 13% to 24%.** In-house developed would drop from 10% to 4%.
6. **The system strategy for 37% is to have records management integrated in a single-suite ECM system. 11% prefer a single-suite ECM plus a separate RM system.** 8% are happy with multiple DM/ECM systems feeding a single RM system and 8% are working to a 3-tier approach – collaboration + ECM + RM.
7. **20% are looking to buy a new or replacement ECM system in the next 2 years, with a further 15% migrating to a single existing system.** 27% will be adding capabilities to best-of-breed and departmental systems.

Workflow and Business Process

1. **28% are using capture supplied with their ECM suite, 22% have a system from a different capture supplier integrated with their ECM.** 46% of small organizations and 27% of mid-size and large have no capture and workflow.
2. **26% of organizations are using multiple, point-solution capture systems (rising to 34% of the largest).** 15% have distributed capture and 13% digital mailrooms.
3. **23% have elements of multi-channel inbound integration, but only 5% with automated routing to multiple processes.** 58% describe their inbound handling as ad-hoc.

ECM Within the Enterprise

1. **In 24% of organizations almost all staff rely on collaboration/ECM/workflow systems to do their jobs.** In 60% of organizations, half or more of employees are reliant.
2. **In 47% of organizations a content system outage of more than 2 hours would cause serious business disruption.** 79% would struggle after one day.
3. **31% have integrated their ECM system with content creation systems, 18% with multi-repository search, 15% with project or case management and 13% with ERP.** 27% have no integration with other systems.

Cloud and Analytics

1. **20% are live with cloud for all or some of their core content, plus 7% with selected users/content or for collaboration and file-sharing only.** 26% have no plans for cloud.
2. **39% prefer "private cloud" (22% on their own servers and 17% outsourced). 19% prefer multi-tenanted cloud, managed by their ECM provider.** 25% have yet to decide.
3. **15% are using automated or assisted classification at the point of creation/declaration. 11% are using analytics for metadata and security correction as a post-process.** 12% use content analytics for business insight.

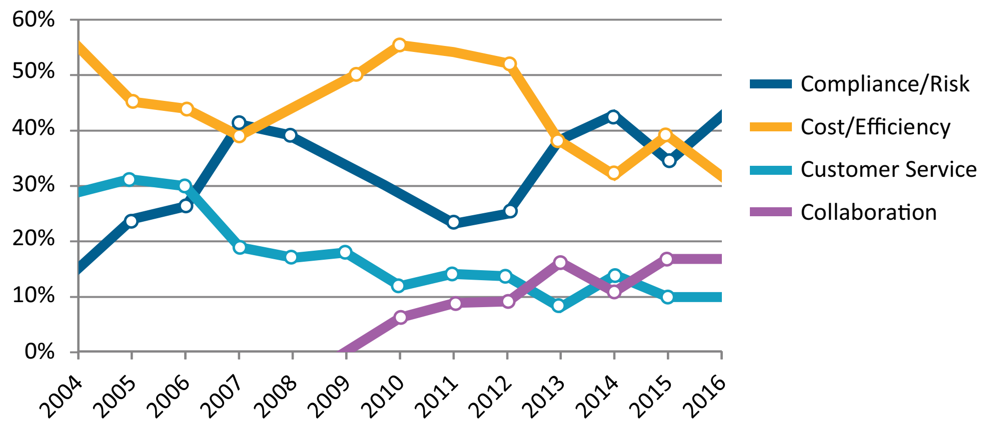
Opinions and Spend

1. **50% of respondents feel that traditional ECM vendors are relying on user lock-in, but 43% feel that cloud ECM/collaboration lacks much functionality.** 31% feel EFSS is taking over many ECM functions.
2. **87% are concerned about cloud chaos and 75% agree that email management is still the "elephant in the room".** 79% report that they have plenty of scope for extending their ECM/BPM/RM.
3. **Cloud and SaaS services are set for the biggest increase in spend, then storage and software licences. Professional services spend is still increasing in around 10% of organizations.** Few organizations plan to increase their spend on scanning hardware, and outsourcing (DPO) is set to fall slightly.
4. **Workflow and BPM show the biggest uptake of new buyers, along with analytics and enterprise search.** Email management and case management spend is likely to increase, as will ECM (including SharePoint), particularly in cloud services.

Drivers and Adoption

AIIM has been tracking the primary driver for IM (information management) investments since 2004 - around the time that the imaging systems were giving way to full-blown content management. At that time, the main driver was cost savings and efficiency. In the post-crash period of 2012/2013, compliance and risk challenged as a driver, and we can see a similar effect happening today, most likely based on security breaches and the regulatory issues in the finance sector. In particular, the largest organizations (over 5,000 employees) have shown a sharp increase in their rating of compliance and risk, up from 38% in 2014 to 59% this year. Mid-sized organizations (500 to 5,000 employees) posted an increase from 35% to 44%, whereas smaller organizations (less than 500 employees) are much more focussed on cost and efficiency improvements, with 40% citing it as the most important, compared to just 22% for compliance and risk.

Figure 1: When you consider your document and records management projects, what is the most significant business driver for your organization? (N=235)



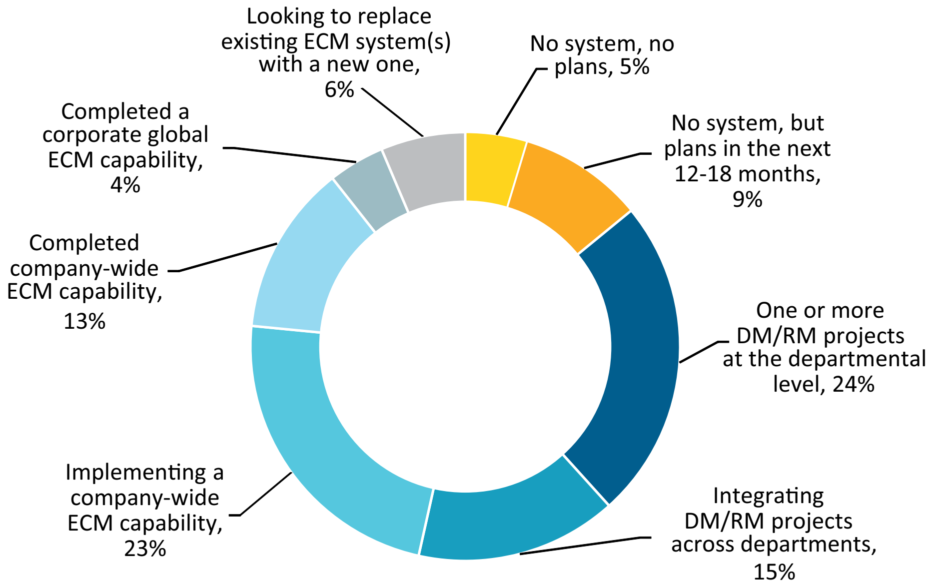
Adoption

We have charted ECM adoption over many years, although terminology is always an issue. For many organizations, the prime application is document management (DM) – controlling the creation, search, access and revision of documents. Extending this across more content types such as emails, faxes, drawings, and images brings more "content" to manage, and extending the lifecycle by declaring content as records and setting retention policies brings in records management (RM). Generally a combination of these is covered by the "ECM" concept.

We also need to sound a further note of warning. Active members of the AIIM community tend to be those who are planning or implementing ECM, rather than those who have a successful implementation behind them and are likely to have moved on. This may explain why the percentage of organizations that report a completed company-wide ECM capability has hovered around 14% or 15% over the past 5 years.

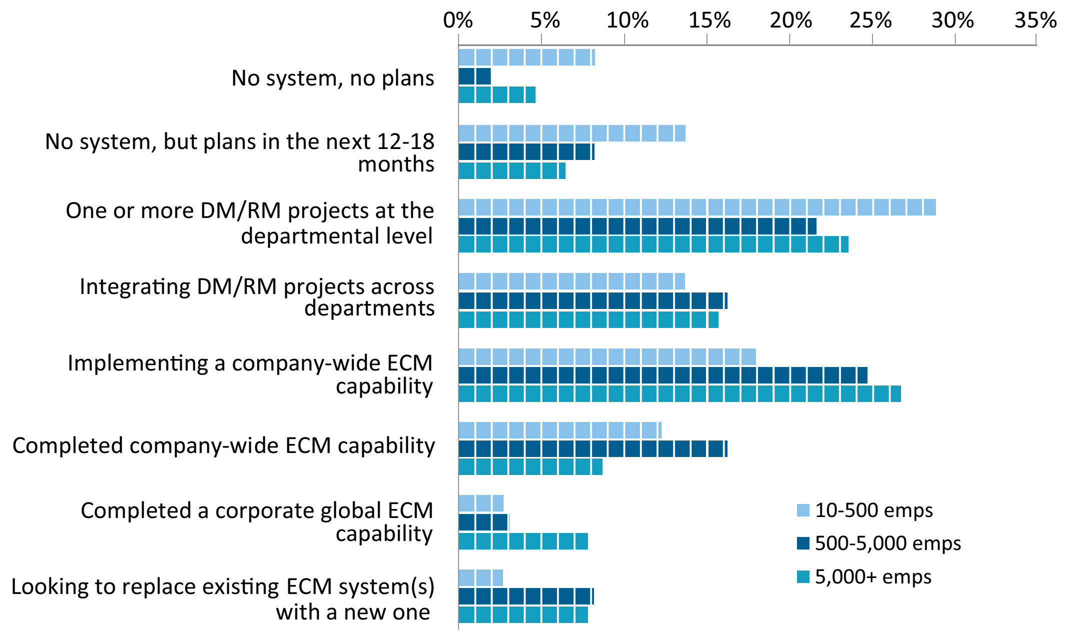
This year we added the "global corporate ECM" category, with 4% achieving this praiseworthy outcome, taking the total to 17%. There are also two other factors. First, the scope of ECM broadens as each new piece of vendor technology comes on stream, or a new content type enters the workplace, and therefore an ECM project is unlikely to ever be deemed "complete". Second, we have only in the past two years added the option "Looking to replace" (Figure 2) although this year it has dropped back to 6% compared to 10% in 2014 – it was 5% in 2013. One further point is that we refer to a "company-wide ECM capability". This does not have to be a single ECM system and could also include the extension of ECM to the cloud.

Figure 2: How would you best characterize your organization's experience with document management (DM), records management (RM) and Enterprise Content Management (ECM)? (N=240)



When we look at the adoption rates by size of organization, we see that although smaller organizations have some catching up to do, most have plans under way. Mid-sized organizations have made the most progress over the past few years, with 19% completing an enterprise capability. 8% are looking to replace, most likely as a consolidation of numerous DM systems, or possibly moving on from a sub-optimum ECM or SharePoint project.

Figure 3: How would you best characterize your organization's experience with DM, RM and ECM? (N=240)



Overall, nearly half of the responding organizations (46%) have completed, or are on their way to completing an enterprise-wide ECM capability.

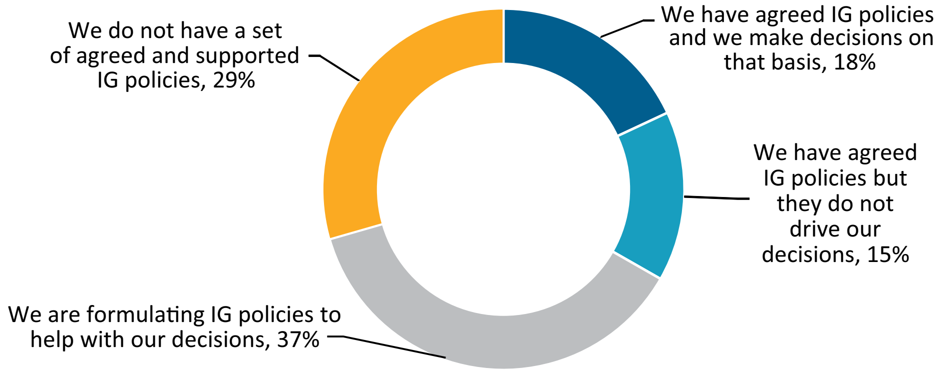
IG Policies

Best practice would dictate that before selecting or enhancing information management systems, organizations should agree on a set of information governance policies that state: what types of content need to be governed; who should have access to them (and on what devices and in which places); what workflows they need to be part of; how they should be declared as records; how long those records should be held; and how they should be disposed of in a way that is defensible in court.

Unfortunately, many IM system initiatives are triggered from a short-term process need, or a general curiosity within the IT department, and as a result, they grow in an ungoverned way, often in parallel with longer term projects for records management and compliance. That said, it can take a long time to produce an agreed set of IG policies, and as we can see in Figure 4, it is a work-in-progress for 37% of our responding organizations.

Perhaps of more concern are the 15% who have been through this process, and yet the policies are ignored when it comes to setting system strategies. Even more disturbing is that 29% have no agreed upon IG policies at all, including an astonishing 23% of the largest organizations.

Figure 4: To what extent are your ECM/IM system decisions driven by a set of agreed and supported Information Governance policies? (N=236)



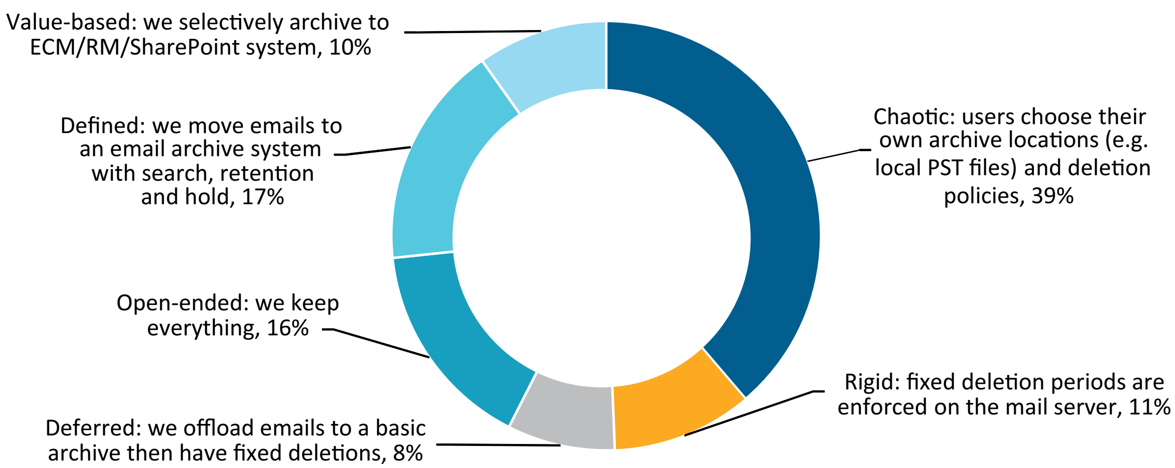
Email Management

We mentioned earlier the importance of keeping a searchable and accessible record of discussions, decisions and commitments made within the business. These days, almost all such instances will be recorded and/or distributed by email. And yet 40% of our respondents, across all sizes and types of organization, describe the governance of their emails as chaotic.

Of the rest, 19% delete emails based on date and not content or value, and 16% keep everything, even though it would be safer from the regulatory point of view to delete them under a defined policy. Only 27% archive emails to a system with search, retention and hold, including just 10% who selectively pass emails to their ECM or RM system based on their potential future value to the business. Fear of overloading the ECM system with too many emails is one reason for this, although this often comes from having no clear governance policies to define which emails to retain as records and which to delete.

Separating useful emails from trivial or transient ones is not simple, and users are simply not good at it. We are only now able to put trust in automated or assisted mechanisms to accurately accomplish this task. However, some blame can be attached to ECM and email vendors, particularly Microsoft, who initially provided little in the way of integration between email and ECM, and have been slow to add functionality for e-discovery and hold. Even where dedicated email archive systems have search, hold and retention functions, they are likely to be outside of the search mechanisms and taxonomies that already exist within the ECM system.

Figure 5: How would you describe the governance of emails in your organization? (N=233)



ECM Status and Issues

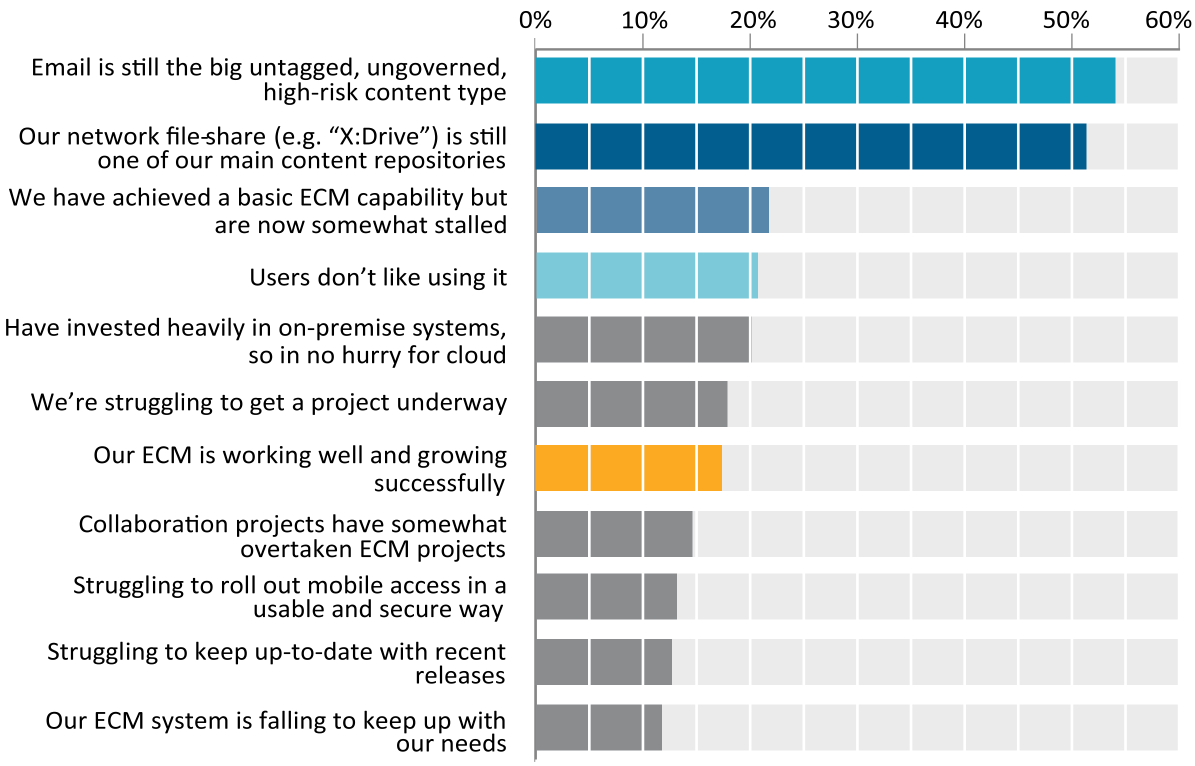
This concern about emails is reflected as the most common issue that users have about the current status of their information management (55% - Figure 6), followed by those who admit that their network file-share is still one of their main content repositories (52%) – despite its lack of access, poor searchability and general chaos.

22% of installations are somewhat stalled, and 21% have user adoption issues. We asked in an open-ended question about the biggest hurdle to 100% success for ECM, and "user acceptance" features quite strongly, as well as "senior management buy-in". Inevitably, these two issues are related in that managing change and overcoming resistance needs to be driven as a culture directive from the top. There is also evidence of the need to get departments to work together, again something that requires senior management to get involved.

Often, the result is that many ECM projects reach a point where some users and some departments are using it, but others are not. And amongst those who are using it, some will put all of their work-in-progress in the ECM, others will merely publish final or completed documents there. This situation requires active management from above, first to establish why users might find it too onerous or inconvenient to use, then to encourage, compel and incentivize users to change their habits.

It also has to be acknowledged that many organizations are simply too diverse and distributed to be likely to ever achieve the "holy grail" of a universal ECM system working to the same rules and policies across all divisions, but a commitment at senior level to a core objective of managing content for enhanced value, security and compliance would be of great help to bringing all parts of the organization to a similar level of information exploitation and governance.

Figure 6: Which of the following apply to your current ECM status? (Pick all that apply) (N=226)



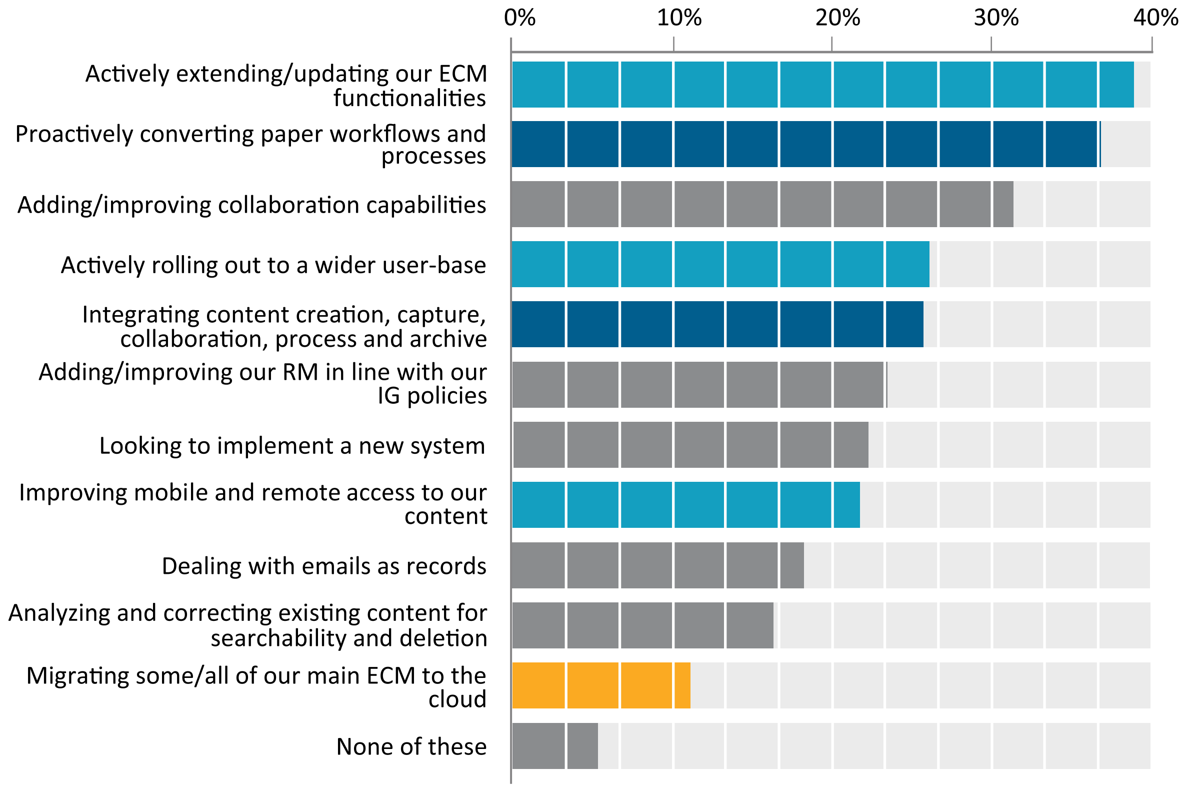
Focus for ECM Developments

Although in Figure 6 only 18% report that their ECM is working well and growing successfully, Figure 7 shows that 38% are focused on actively extending ECM functionality and 25% are rolling out to a wider user base. Other areas of project focus are improving collaboration (30%) and improving mobile and remote access (21%). These numbers reflect a willingness to continue with investment, and confirm that the vision of an enterprise-wide content management capability is still widely held.

Process improvements and workflow are also key features, as we will see later. They represent a much deeper added value for ECM in general, often coming as a second phase of development, although they can also represent a much stronger hard-dollar return on investment that justifies the original business case. 36% are proactively converting process workflows to paper-free, and 25% are integrating the document lifecycle across creation, capture, collaboration, process and archive. In the latter case, this may well involve integrating multiple systems rather than simply creating workflows between the modules of an ECM suite.

Despite what many vendors might wish, migrating content to the cloud is not a main priority for most users (11%), although as we will see later, it has become a mid-term objective for many.

Figure 7: Which of the following describe your biggest project focus for ECM/IM right now? (Max THREE) (N=232)



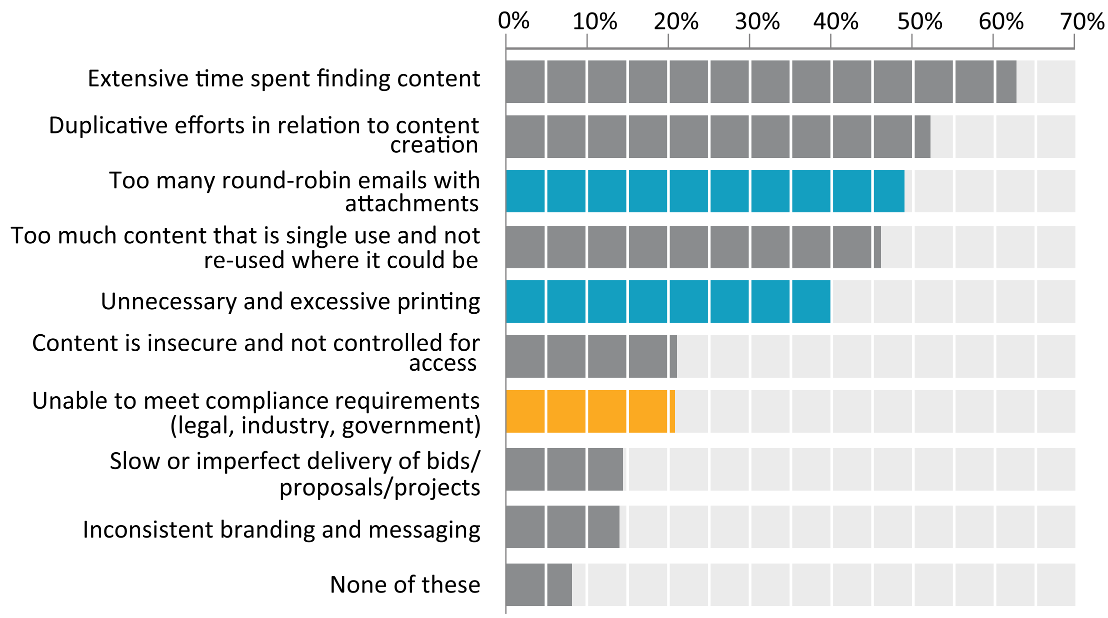
39% of organizations across all sizes describe their email management as "chaotic," and for 52%, the network file-share is still one of their main repositories.

Content Creation, Access and Deletion

We saw earlier that connecting all aspects of the content lifecycle from creation to deletion is an important priority. Until ECM systems are more widely deployed, many of the classic content management issues will still prevail.

Enterprise-wide search is still under-developed in many organizations, and so it takes too long to find content, which leads to duplicate effort in re-creating content rather than re-using content. Even within documents, structured authoring can control re-usable elements through revision cycles, and as we will see, new collaboration mechanisms and much wider access can be managed under the ECM umbrella.

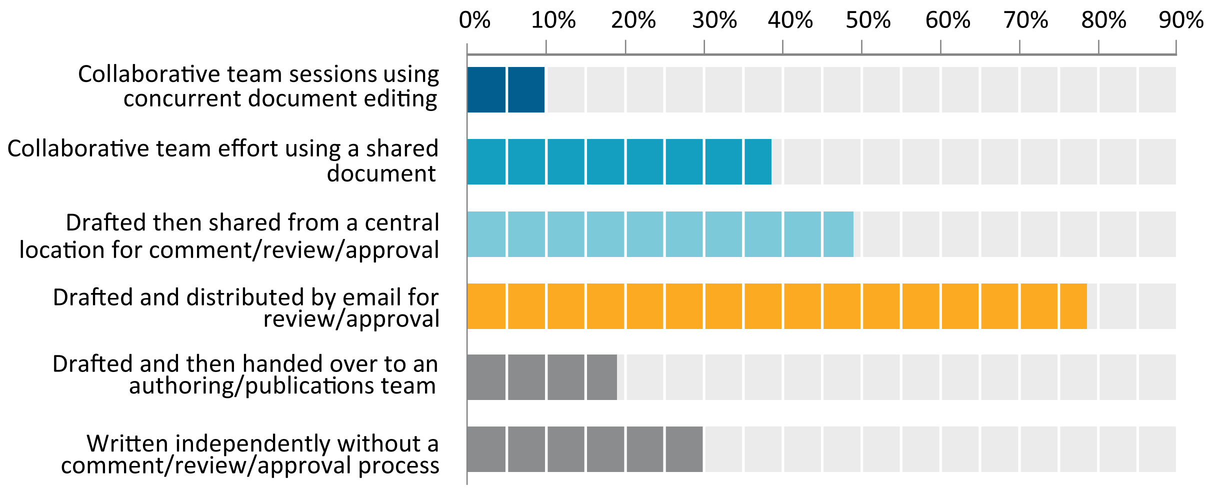
Figure 8: Does your organization experience any of the following issues related to poor content management practices? (Pick top FOUR) (N=201)



It's easy to assume that most content is created in office applications (and, of course, email), but scanning and capture plays its part (89%), along with web-publishing and desktop publishing tools (50%). E-learning and CAD/GIS are content generators in 30% of organizations, and 25% use structured authoring tools. 51% are dealing with video as a content type, 38% still images and 27% audio.

When it comes to the collaborative mechanisms used for content creation, it's good to see (Figure 9) that 49% are using shared-copy review, but only 10% with concurrent editing, and 38% with collaborative drafting. 78% are still using the time-honored (and somewhat inefficient) method of circulating multiple copies by email for review and approval.

Figure 9: Which of the following mechanisms does your organization/department most use for content creation? (Max THREE) (N=195)

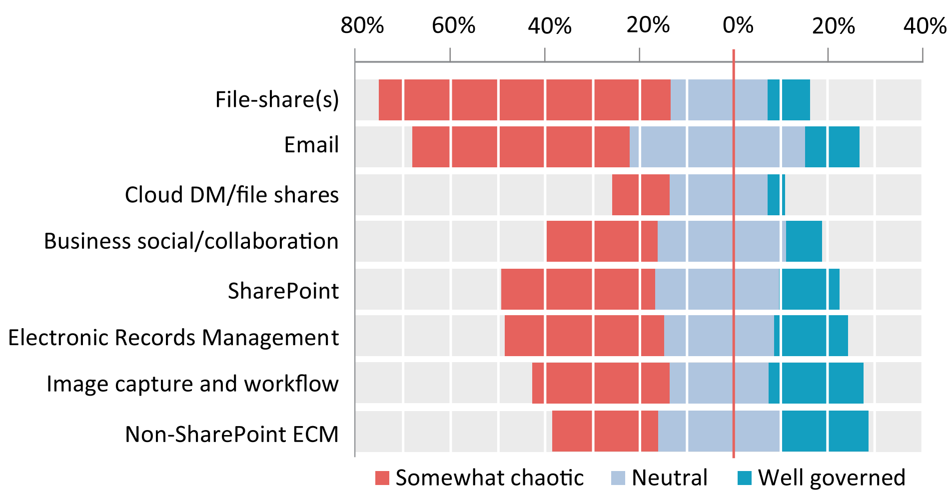


Levels of Governance

Given the extended content types described above, and the range of repositories that they may reside in, it is no surprise that the levels of governance vary considerably. As we might expect, file shares are described as chaotic in 64% of organizations, and emails for 48%. Somewhat more surprising is that electronic records management is considered chaotic by 35% of respondents, as is SharePoint. Given the more stringent governance measures typically placed on records, through long standing records management policies and practices, one would think this percentage would be smaller. This may be the result of a lagging transition from managing paper-based records to managing a combination of both paper and electronic records by records managers.

Non-SharePoint ECM fares best, although only 20% of users consider theirs to be well governed, compared to the 23% saying somewhat chaotic. As yet, the indications are that cloud file shares and workplace social systems are not being at all well governed, and as they grow, the inevitable chaos will ensue.

Figure 10: How would you describe the following repositories in your organization: (N=198. Line-length indicates "We don't have this")



In a follow-up question, Non-SharePoint ECM scored best for "easily searchable" but only by 35% of users, compared to 27% for SharePoint. Non-SharePoint ECM is a little less likely to be used enterprise-wide (44%) compared to SharePoint (57%).

Content and Process Access on Mobile

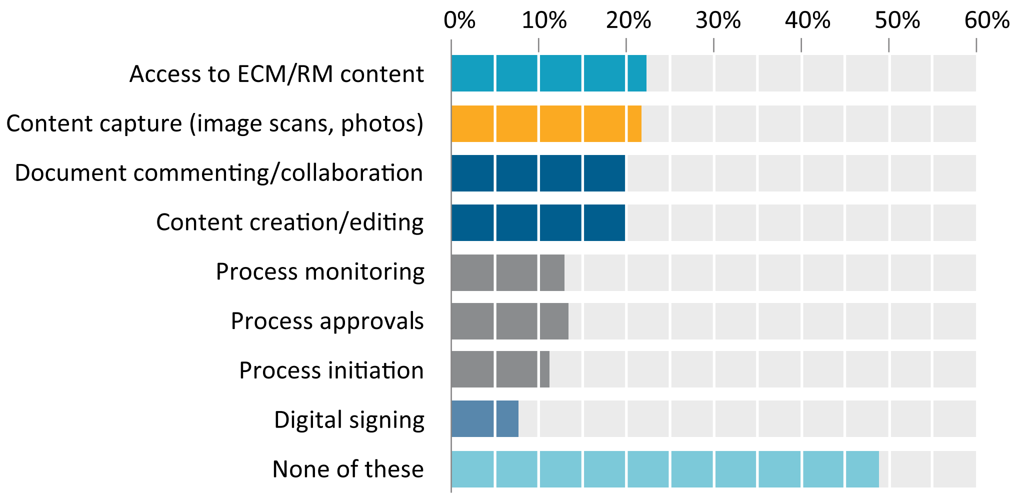
There is a degree of disconnect between personal willingness to access content on mobile devices and corporate policy. Nearly 60% of respondents say they embrace content access on mobile, but only 43% have departmental support, and 31% company-wide support. In practice, only 22% have mobile access to ECM/RM systems, although 21% have image and scan capabilities for mobile capture.

Participating in review cycles while on the move is one of the big drivers for mobile access, but only 19% have document commenting and collaboration. This situation should improve with the increased availability of MS-Office applications on mobile devices, and the increased functionality of web-editing in cloud file-share-and-sync products.

Of course, there are degrees of both security and convenience here. Ad-hoc approvals via email is possible, but somewhat unreliable. Less than 13% have any form of managed process monitoring and approvals when mobile, and only 8% are able to use digital signing from mobile devices.

50% are somewhat disadvantaged by having no mobile access to content, process or approvals.

Figure 11: Which of the following do you have formally available and managed on mobile devices? (N=198)



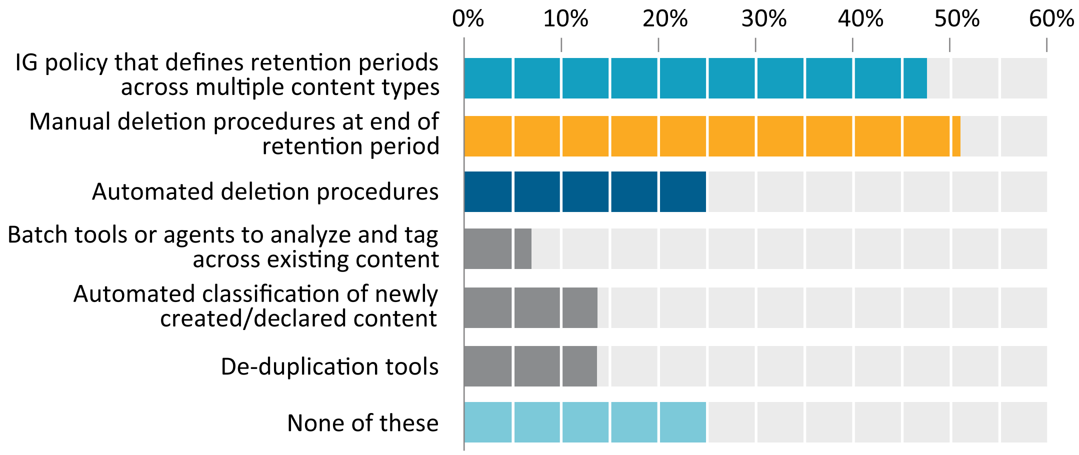
Content Deletion

We mentioned earlier the fear that ECM systems can become overloaded with emails and other trivial content, If no policies and mechanisms are set to delete content, then this will inevitably happen. However, arbitrary time-based decisions that take no account of content types and compliance rules are unlikely to be considered “defensible deletions” in court.

47% have an IG policy that defines retention, which is good, but 51% rely on manual deletion compared to 25% who have more reliable automated procedures. Of course, these will only work if suitable metadata has been defined from the start. This is where batch tools or agents can be used to analyze and correct metadata across existing content, as well as improving the tagging needed for search. They will also spot duplications.

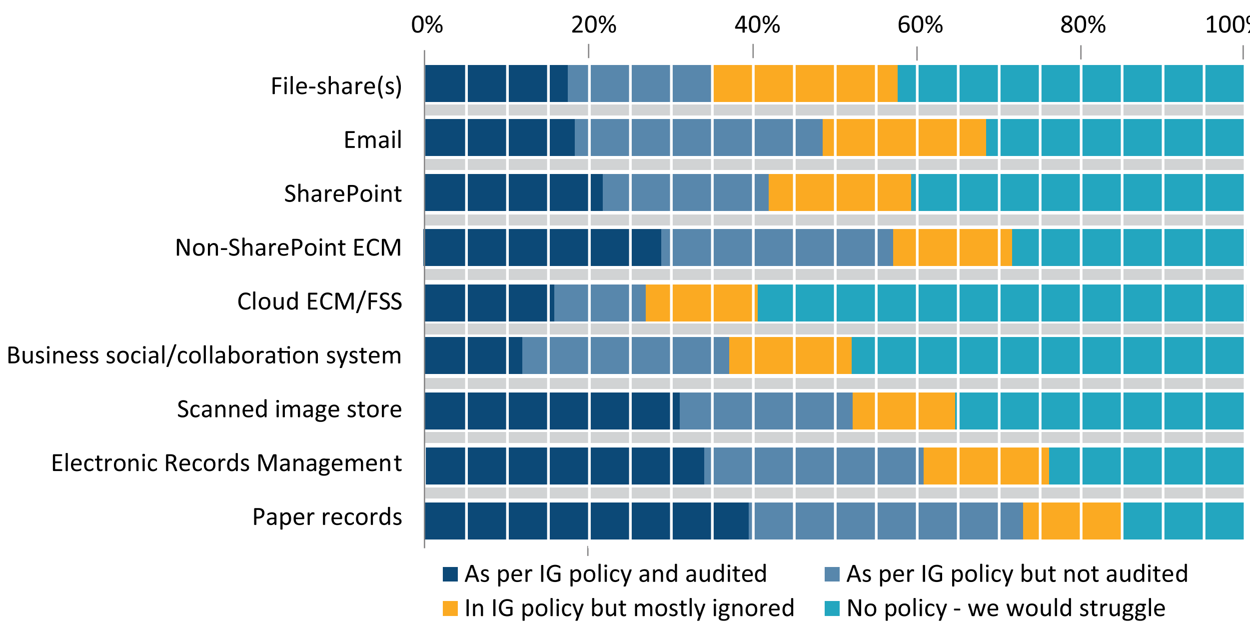
24% admit to having no mechanism to limit volumes of stored content, including 21% of the largest organizations. It is for these organizations that AIIM coined the term “digital landfill” - a constant drain on storage resources, providing little value to the business, and potentially becoming a toxic risk.

Figure 12: Which of the following measures are you taking to limit the amount of stored content that you need to manage? (Pick those in regular use) (N=177, excl. 20 Don't Knows)



As a follow up question, we asked how defensible deletion might play out across different content stores and content types if raised in court or in a compliance investigation. 60% admit they would struggle with cloud EFSS, half would struggle with workplace social and file shares, and over 30% would struggle with email,. Surprisingly, SharePoint fares worse at 40%. This compares with non-SharePoint ECM and electronic RM at 25%. Around 20% are following a defined policy in most areas, but they are not auditing compliance, which could raise questions in court - challenging the organization's information management practices as a whole. Paper records have the best estimate of defensibility, but even here, only 40% follow IG policies and audit their compliance.

Figure 13: To what extent do you think you could defend in court the deletion/ disposition of content from the following? (N=192, normalized for N/A and Don't Know)



Half of organizations would struggle to defend their content deletions in court, and 24% have no mechanism to limit volumes of stored content, including 21% of the largest organizations.

ECM Systems

Despite the sought-after goal of a single enterprise-wide content management system, most organizations have several. We find that more than half have 3 or more systems and nearly a quarter have five or more, rising to more than a third of the largest organizations. These may include a classic suite-based system tied to process applications, one or more SharePoint deployments, a number of simpler document management systems in use in different departments, a dedicated imaging system, and a stand-alone records management system.

SharePoint is the strongest player. 62% of our (self-selected) survey respondents use SharePoint as either a main, secondary or legacy ECM/DM/RM system. This includes the '365 online or cloud version in use by 27%, of which 12% use it exclusively online. No other supplier has more than a 23% share of the installed base across these categories. Focusing on what users consider to be their "main" system, 40% cite SharePoint, although it has to be said that almost all of these consider one or more other systems to also be a "main" system. Next highest market share for "main" system is 18%.

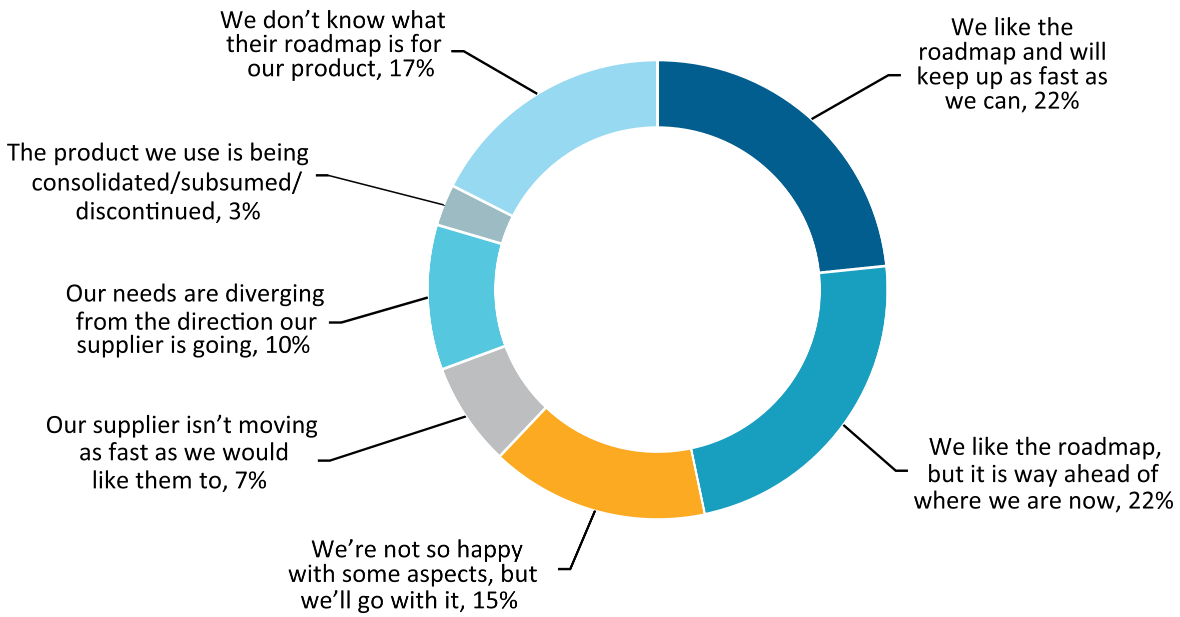
SharePoint has been around for 13 years, although the big take up commenced 9 years ago in 2007. We shouldn't therefore be surprised that 8% consider it to be a "legacy" system for them, especially with the new cloud EFSS systems proving attractive to smaller organizations. More surprising is that of the next group of suppliers, who all have a much longer lineage than SharePoint, the numbers considered to be "legacy" range from 7% to 15%, with an average of 12%.

At this stage in market maturity, many users can feel trapped with their current system, so we asked how they felt about their supplier's roadmap for product improvement (Figure 14).

Overall, 44% are happy with the direction their supplier is taking, although only half feel able to keep up with the pace. 20% are having problems with their supplier, and 17% don't know what their supplier's road map is.

In general, SharePoint users seem to be a little more comfortable with their supplier's plans, although in last year's survey there was identifiable concern about Microsoft's commitment to ongoing development of the on-premise version of SharePoint. This has subsided with the advanced visibility of the 2016 version.

Figure 14: How well aligned is the roadmap of your main ECM supplier with your own needs and plans? (N=143, excl. 41 Don't Know or N/A)



System Characteristics

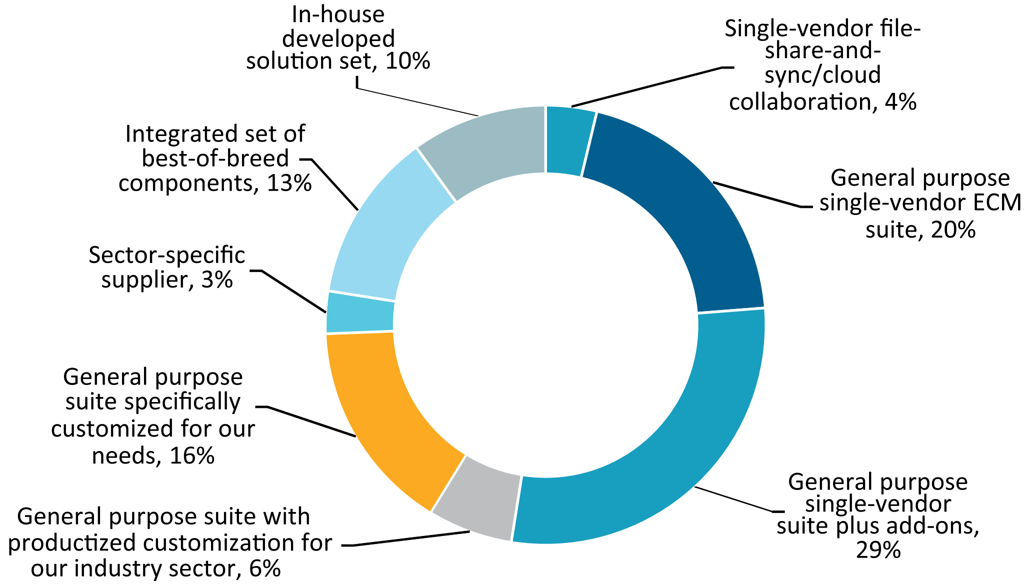
Information management deployments come in a number of different flavors, ranging from general-purpose single-vendor suites to best-of-breed integrations and in-house developments. Of late, these have been joined by cloud-based, file-share-and-sync and collaboration systems.

Nearly three-quarters (72%) are using a single-vendor general purpose suite (which includes SharePoint). 20% have made no major changes to the out-of-the-box product, whereas 29% have add-on products. 16% have customized their suite to meet their needs (rising to 22% of the largest organizations), whereas 6% have a productized customization of a general purpose suite specifically for their industry sector.

Larger organizations are more likely to be using an integrated best-of-breed deployment (17% vs 10% for smallest) whereas 16% of the smallest have in-house developed systems compared to 6% of the largest.

File-share-and-sync/collaboration systems (EFSS) show most early adoption from smaller organizations (8%) as we might expect, but is also listed by 6% of the largest (and none of the mid-sized).

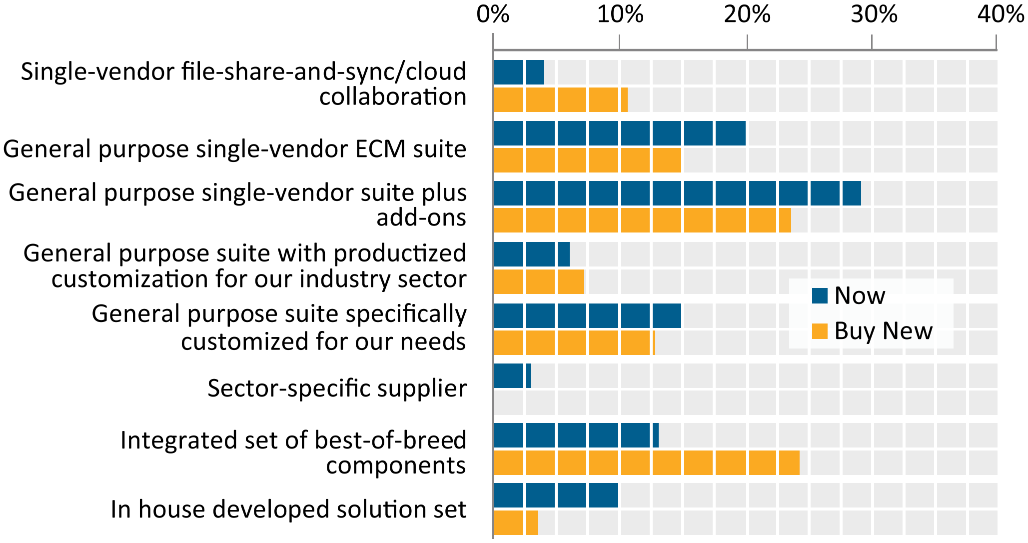
Figure 15: How would you best describe your current main ECM/DM/RM system? (N=158, excl. 22 N/A)



Having established the type of system users currently have, we wondered (Figure 16) how that might change if they were to replace their current system with a new one. Of course, for many this would be impractical given how much they have invested in their current systems.

EFSS/cloud collaboration systems would become much stronger contenders, jumping from 4% to 11% overall (14% for the smallest, 8% mid-sized and 12% largest). Best-of-breed shows a doubling from 13% to 24% across all sizes of organization. This may reflect that integration of components is becoming easier, or more likely that existing systems would be moved to more specific functions with others brought into their areas of best fit. General purpose suites show some decline overall from 70% to 58%, but not so much for customized solutions.

Figure 16: If you decided to change your ECM/DM/RM system(s) or buy new, which model would you likely adopt? (N=141, excl. 38 Don't Know)

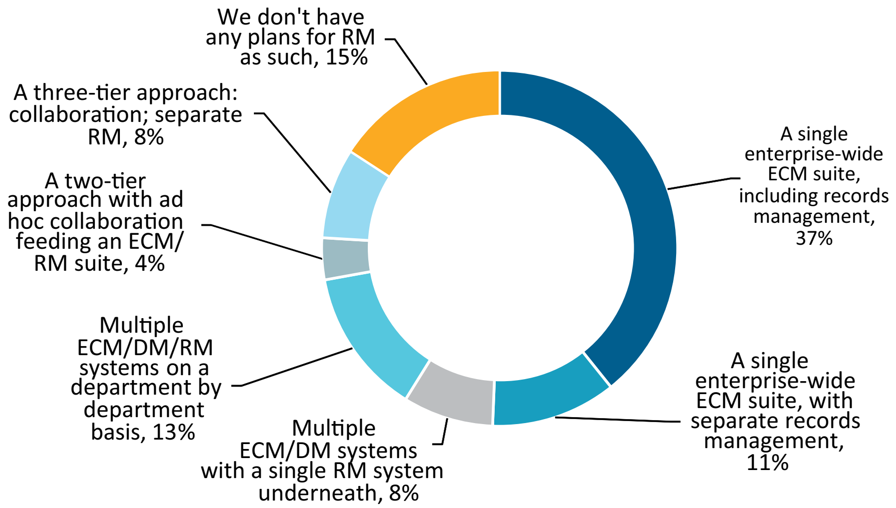


RM System Strategies

In many organizations, records management systems pre-date ECM systems. Often they were initially used to manage paper records, or possibly engineering, plant, or patient records. As a result, many users still have separate systems. Subsequent to this, it has become a perfectly viable model to have a single RM system underlying a number of departmental or process-based ECM systems, providing a robust infrastructure for compliance and litigation support. On top of this, some organizations are working to a three-level system, with file-share and collaboration at the top, project and other active documents in the middle, and records management at the bottom.

37% of organizations are using the classic arrangement of a single ECM suite to cover all areas (43% of small organizations and 33% of large), with a further 19% using one or more ECM/DM systems feeding a separate RM system – for larger organizations, it's much more likely to be multiple feeder systems. 12% have taken on board the inevitable usage of ad-hoc collaboration systems, and incorporated them into an official 2-tier or 3-tier policy. 15% have no system for managing their records, including 10% of the largest (5,000+ employee) organizations.

Figure 17: Which of the following RM system strategies is closest to your own? (N=168, excl. 17 Don't Know)

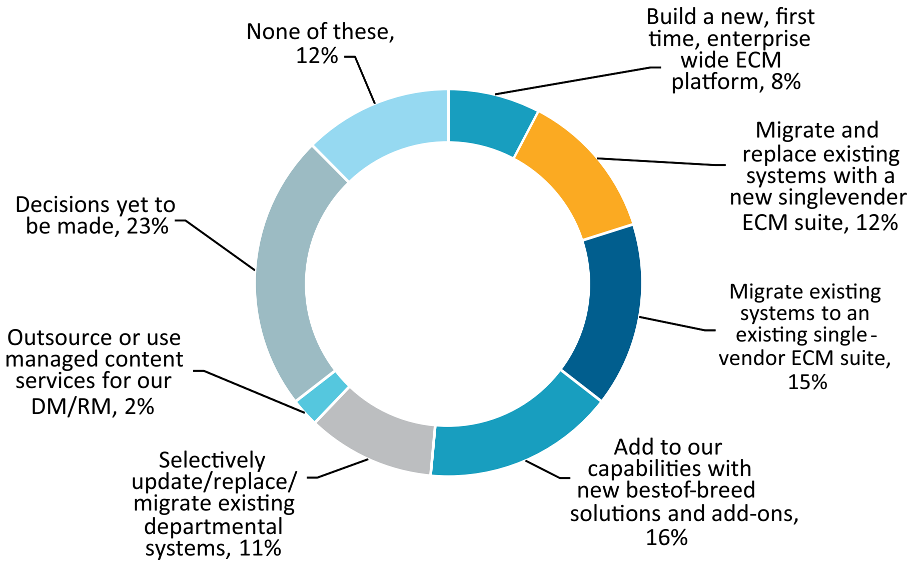


Future Plans

We mentioned earlier that most users have invested considerable time and resources into their existing systems, making it difficult to change. However, if existing systems do not support remote, mobile and cloud access, or if they are not capable of robust records management or process workflow, then users will be disadvantaged. It is also true that many users have needed to approach system upgrades as a migration project given that the original data was not well tagged and classified, or that they implemented heavy customization, so it can be as easy to change system as it is to upgrade.

Altogether, 20% of organizations say they have plans to implement a new ECM system in the next 2 years, including 8% first-time users. A further 15% will be consolidating multiple existing systems to a single system that they already have.

Figure 18: Are you currently, or do you plan to do any of the following in the next 2 years? (N=169 excl. 15 Don't Know)

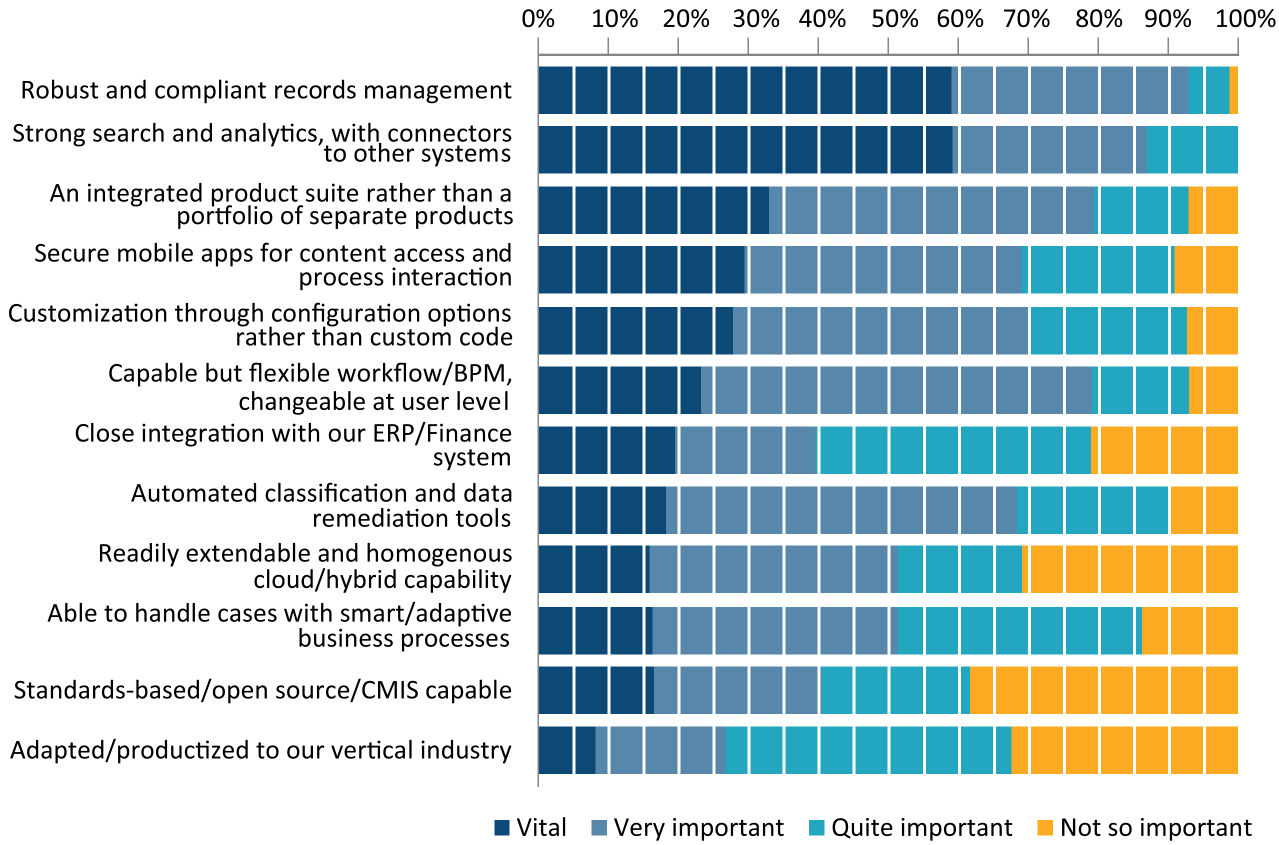


We asked those considering a new or consolidated system what would be the most important aspects in making their choice. Two key requirements rose to the top—reflecting weaknesses in many existing systems, particularly those originally intended as simple document management systems. These were robust and compliant records management, and strong search and analytics. Both were cited as vital by nearly 60%. A third would only be interested in an integrated product suite, rather than a portfolio of separate products, and a further 46% would consider this to be very important.

Secure mobile apps takes 4th place, and users are looking for easy configuration, particularly for workflow and BPM (5th and 6th place).

40% are looking for close integration with their ERP, and automated classification and data remediation is a popular requirement (68% vital or very important). 50% are looking for ready extension to cloud , and 16% consider open standards such as open-source and CMIS to be vital, 27% desirable.

Figure 19: As you are considering a new, replacement or consolidated ECM system, how important would each of the following aspects be? (N=53 planning a new or consolidated system)



72% are currently using single-vendor ECM suites, albeit with add-ons and customizations, and they will continue to be the most popular option in the future, although there is an increasing interest in EFSS, and also integrated best-of-breed. Robust records management and strong search and analytics are the key must-haves for replacement systems.

Workflow and Business Processes

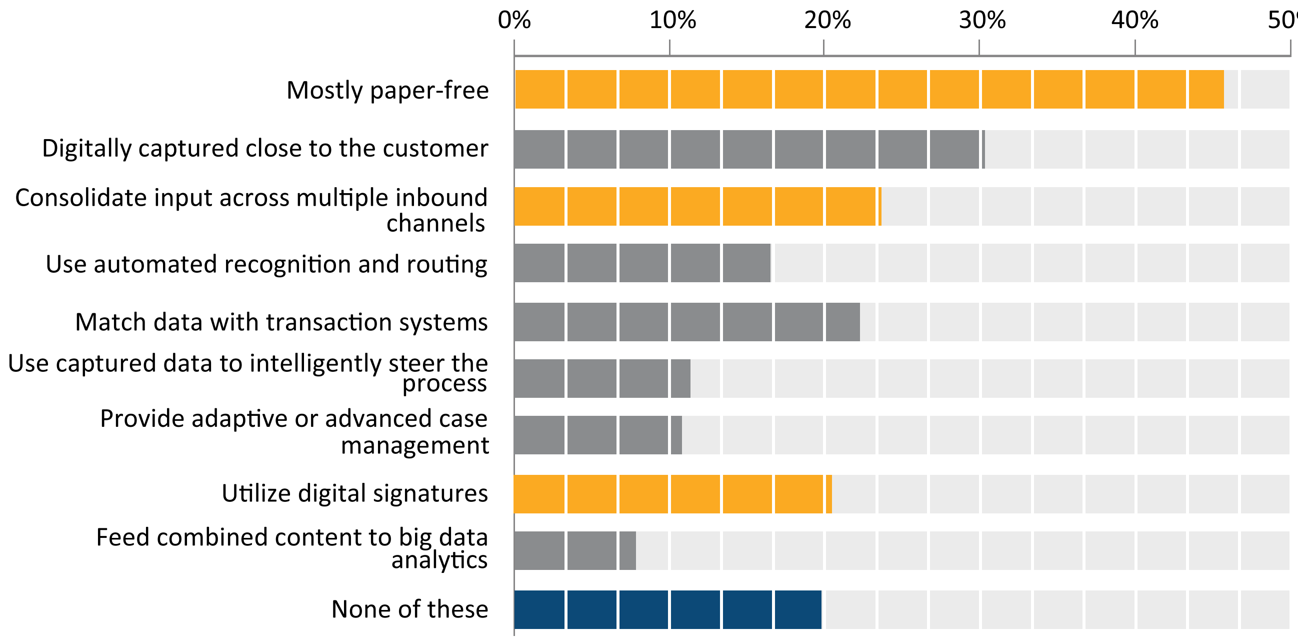
Based initially on processing inbound forms and coupons, capture, workflow and BPM have always been part of the information management toolset. There has also been a constant stream of mergers and acquisitions of capture companies by ECM suite vendors as they seek to provide a one-stop-shop for inbound content handling and downstream processes. Data recognition through OCR has also featured in these offerings, and in recent years, simple capture of forms content has escalated to smart process management and content analytics.

Converting processes to paper-free has always been an AIIM campaign, and is covered in detail in our annual Paper-Free report.[2] It is encouraging that 46% of organizations do have business processes that can be described as paper-free, although somewhat discouraging that 54% don't have any. The closer to the customer that digital conversion takes place, the greater the benefits for automated routing, digital transmission, speedy response, and monitoring of process bottlenecks, and 30% are doing this.

It is also important that with the increase in types of inbound communication – paper, email, social, SMS, and voice – that these are dealt with in a parallel way, so that everyone is up to speed and the downstream processes are fed in parallel.

Stopping all-electronic processes to print and add signatures is particularly disruptive, and it's good to see that 21% of our respondents are using digital signatures to overcome this.

Figure 20: Do you have business processes that can be described as follows? (Pick all that apply) (N=167)

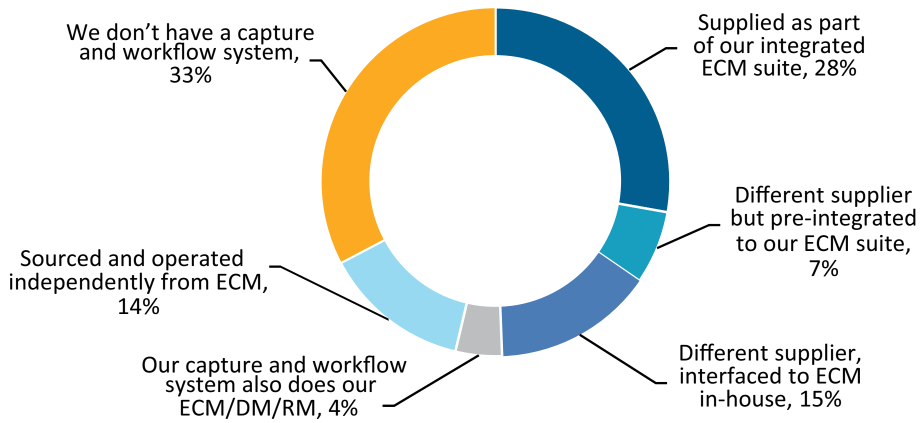


Capture and Workflow Systems

Over half of organizations have a capture and workflow system that is integrated with their ECM suite either supplied as part of the suite (28%) pre-integrated with the suite (7%) or from a different supplier and interfaced in-house (15%).

Many capture systems are purchased against single process improvement projects (often AP automation) and 14% here have stand-alone capture systems. From the IM point-of-view, these would be much better connected to ECM to manage the downstream images for access and archive. A quarter of mid-sized and large organizations have no capture and workflow capability, 46% of the smallest.

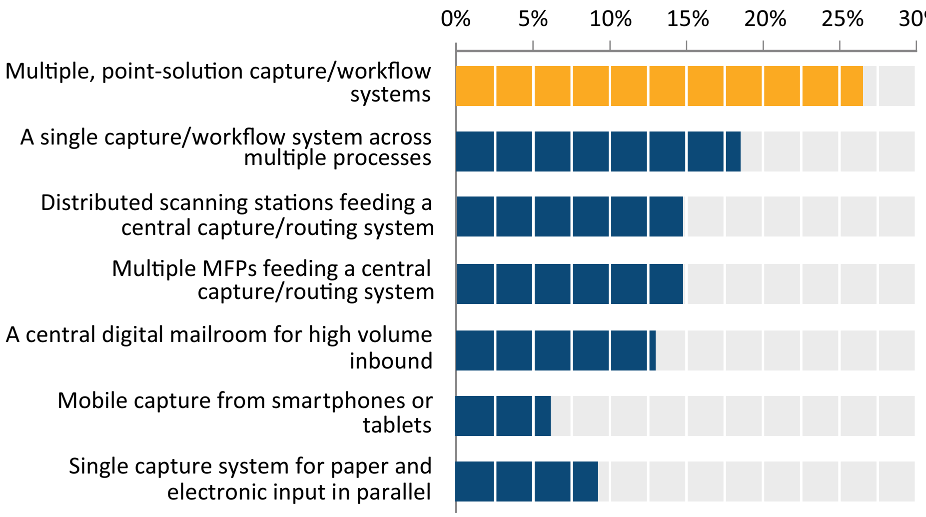
Figure 21: Which of the following best describes your current system(s) for capture and workflow? (N=163)



We explored the configuration and integration of capture systems further in the next question, (Figure 22). In contrast to the answers above, 26% of organizations (34% of the largest) operate some capture systems in a stand-alone mode against specific point-solutions, compared to 18% who utilize a single capture and workflow system across multiple processes.

15% are using distributed capture, although surprisingly, only 35% of these include MFPs. 13% operate a digital mailroom for high volume inbound content. Despite the benefits of handling paper and electronic input through the same workflow, only 9% use a single capture system for both.

Figure 22: Which of the following capture and workflow system arrangements do you use? (Pick all that apply) (N=163, None of these/no capture 34%)

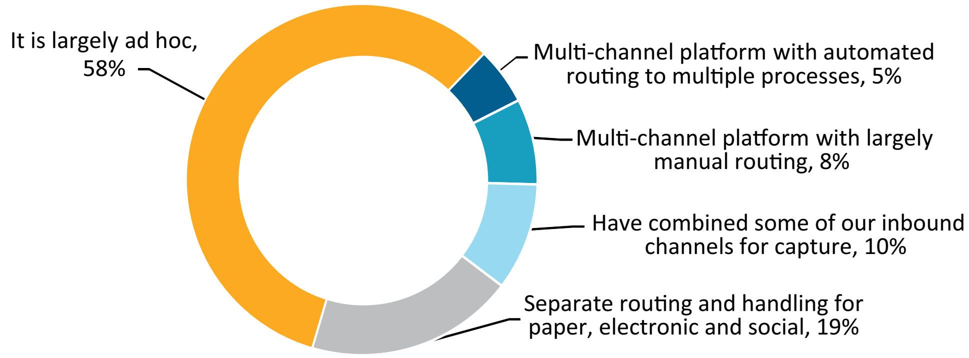


Multi-Channel Inbound

All businesses receive inbound items through email, fax and paper, and often text messages and social media messages too. Those dealing with large numbers of customers or those operating customer service help desks are likely to have considerable volumes arriving on these multiple channels. Customers don't differentiate as to which channel they use: they want the same level of response from all of them, and they want their CRM record to be bang up-to-date.

5% of respondents have implemented a multi-channel platform using recognition to automate routing to multiple processes, with a further 8% using mainly manual routing. 10% have taken steps to combine some of their inbound channels. This leaves 19% who are consciously treating paper and electronic channels separately, and a huge 58% who have a largely ad-hoc approach to inbound communications. This breakdown is very similar across all company sizes.

Figure 23: How do you deal with multi-channel inbound communications? (N=151)



58% of organizations have no formal structure to deal with multi-channel inbound communications in a streamlined and integrated way. Only 5% have a multi-channel platform with automated routing to multiple processes.

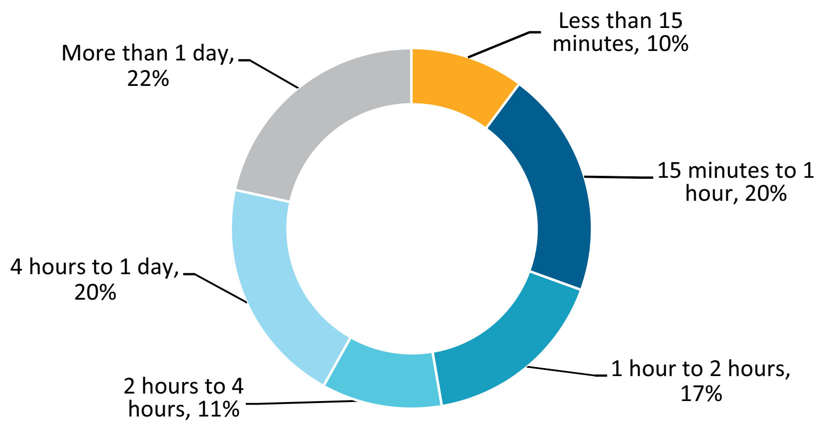
ECM Within the Enterprise

When AIIM coined the term Enterprise Content Management, the intention was to demonstrate that ECM stands alongside other enterprise systems as a business critical support infrastructure. "Business critical" can be an imprecise term, but when we asked users to quantify how long before ECM downtime or malfunction would cause serious disruption (Figure 24), 30% said one hour or less, with 47% experiencing serious business disruption after 2 hours, and a total of 79% struggling if their ECM capability were to be out of action for a whole day.

In a separate question, we asked, "What proportion of the office/knowledge workers in your organization depend on your collaboration/ECM/workflow systems to do their everyday jobs?" In 24% of organizations almost all office staff rely on collaboration/ECM/workflow systems to do their jobs. In 60% of organizations, half or more of employees are reliant.

So in this respect, I think we can consider ECM to have taken its place as one of the pillars of enterprise IT on which the business depends.

Figure 24: How long before a system outage or major slowdown of your most critical content application would cause serious business disruption? (N=331)



Integration

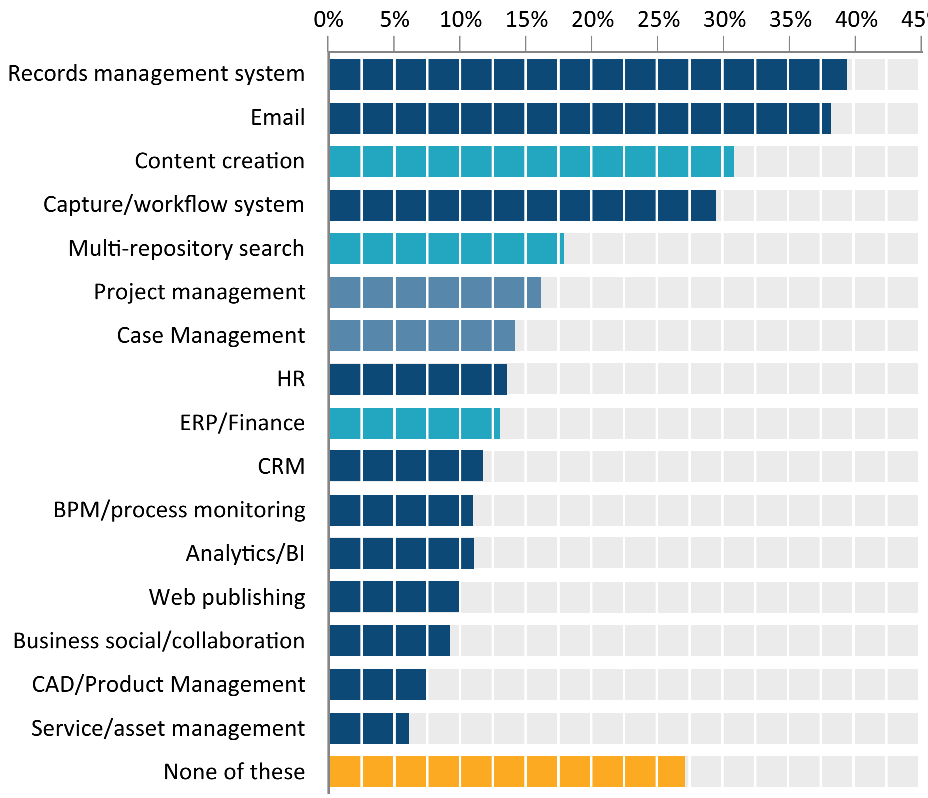
Of course, ERP, CRM, purchasing systems, and project management systems are all likely to collect documents and content in their own right, as well as purely transactional data. These are prone to form multiple silos of information, spread throughout the enterprise.

Accessing this data from one point, and for a wider base of users, is one of the challenges for ECM. Integration through API and CMIS (Content Management Interoperability Services) interfaces is becoming easier, although some integrations provide a much higher degree of two-way interaction than others. In Figure 25, we see that not surprisingly, records management and then email are the most likely to be integrated (although still only 38% for email, backing up what we said earlier).

31% of ECM systems are integrated with content creation systems, and importantly, 18% with multi-repository search – still a low number when we remember the issue of recreating and duplicating existing content if it cannot be quickly found. 15% have integrations with project or case management systems. Surprisingly, only 13% report an integration with ERP or Finance systems, despite nearly half having AP automation.

27% of ECM systems operate in a stand-alone mode having no integration with other applications.

Figure 25: Is your ECM/DM system integrated with the following enterprise applications? (N=163)



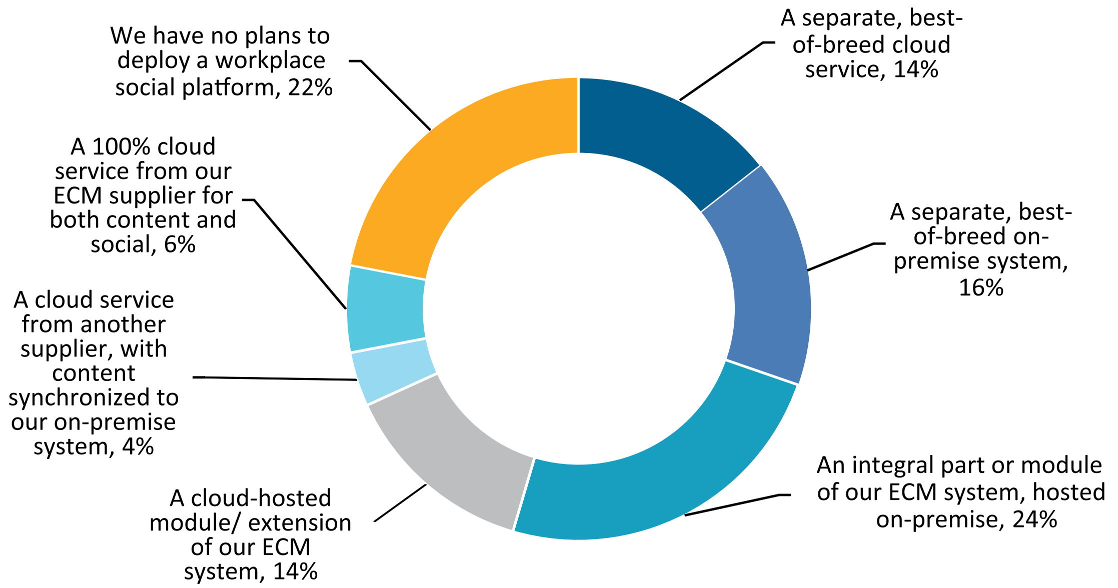
Collaboration/ECM/workflow systems can be truly considered business-critical. In a majority of organizations, half or more office workers depend on them for their day-to-day jobs, and for 47% of organizations, a content system outage of more than 2 hours would cause serious business disruption.

Workplace Social

As an extension to the collaboration functions already available in many ECM systems, the suite vendors have moved to enhance these capabilities towards what we term workplace social, business social, or enterprise social networks. Although initially starting down this path with SharePoint, Microsoft then purchased Yammer and has been proceeding (slowly) to integrate it back into SharePoint. Many organizations have instead opted for best-of-breed offerings such as Jazz or those integrated with CRM such as Chatter. Anyone who has such a system will quickly realize that it provides another opportunity to store and share documents that then live outside of ECM, and are likely to be poorly served by search.

Intriguingly for a product that in concept parallels the web services of Facebook and Twitter, 40% of our respondents would prefer an on-premise system to a web-based SaaS service. Either way, 44% would prefer to source their workplace social as a module or extension of their ECM system, compared to 34% preferring a best-of-breed system or service.

Figure 26: Going forward, what would be, or is likely to remain, your preferred source for your main internal/workplace social platform? (N=132, excl. 35 Don't Know)



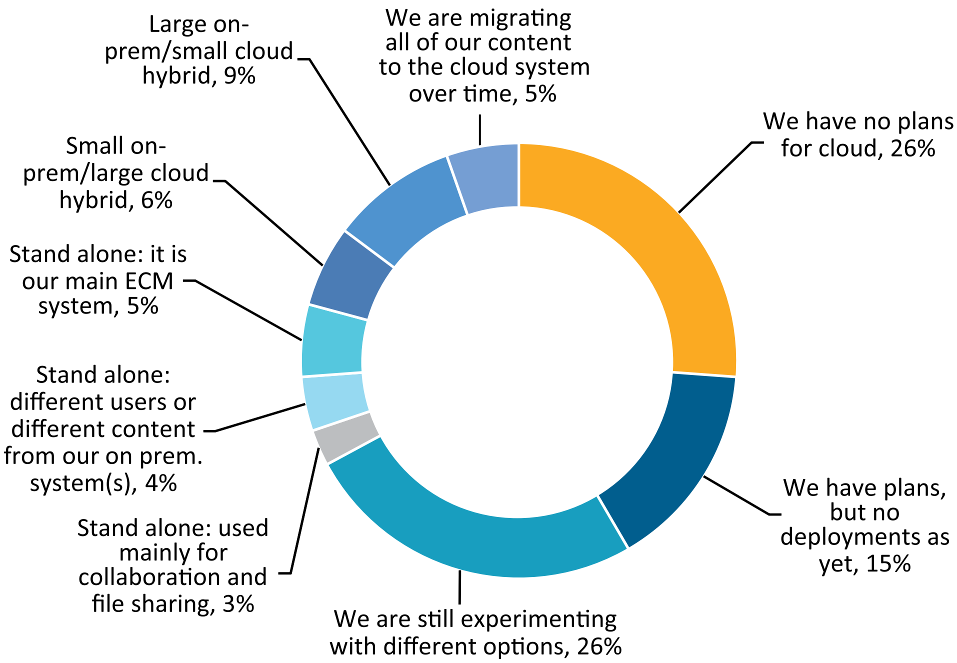
Cloud and Analytics

We have seen over recent years a change in attitude to the deployment of content systems to the cloud from "if" to "when". Many organizations are committed to moving applications to the cloud as and when they are reviewed or replaced, although as we will see later, this may simply be part of a general virtualization of otherwise private data centres.

Compared to mobile, there is less of a disconnect here between individual views and those of the business, with 55% or our respondents prepared to personally embrace content in the cloud, compared to 43% of departments and 36% for company-wide deployments.

Having said that, 5% are fully web-based for their main ECM system already, and 15% have hybrid systems (6% "thick-cloud", 9% "thin-cloud"). A further 5% are moving their content to cloud over time. 34% have prototype systems, or are using cloud for specific applications or content. This leaves 15% who have plans but no deployment as yet, and the inevitable 26% who have no plans, or are yet to make a decision.

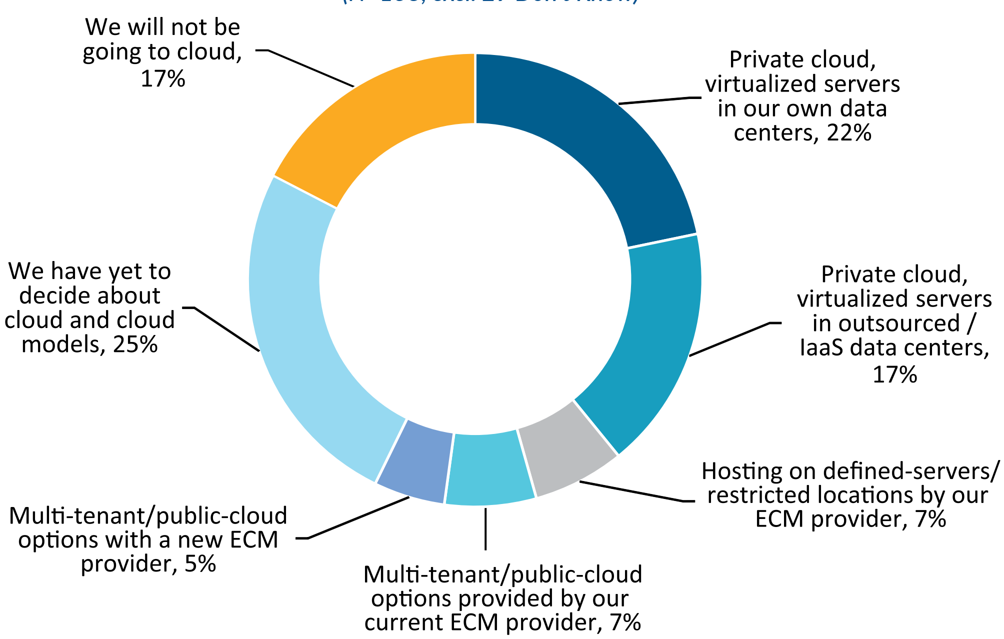
Figure 27: How would you describe current cloud ECM/DM deployments in your organization? (N=171)



Private vs. Public Cloud

It would be easy to imagine that when users say they are using or intending to use "content in the cloud" they mean public cloud on multi-tenanted servers. For 12% of users, this is indeed the case, most likely as supplied by their ECM provider - albeit probably using Amazon Web Services or Azure underneath - or for a further 7%, on defined servers hosted by the ECM supplier. For the majority of cloud users, (39% of overall) cloud means a private cloud on virtualized servers either in their own data centres (22%) or outsourced data centers (17%).

Figure 28: What is, or is likely to be, the preferred model in your organization for hosting or cloud deployment of ECM? (N=138, excl. 29 Don't Know)



25% of organizations are live with cloud for some or all of their content, including 15% using a hybrid model. Only 19% have a preference for a multi-tenanted or ECM supplier-hosted model, compared to 39% preferring private cloud, half on their own servers and half outsourced.

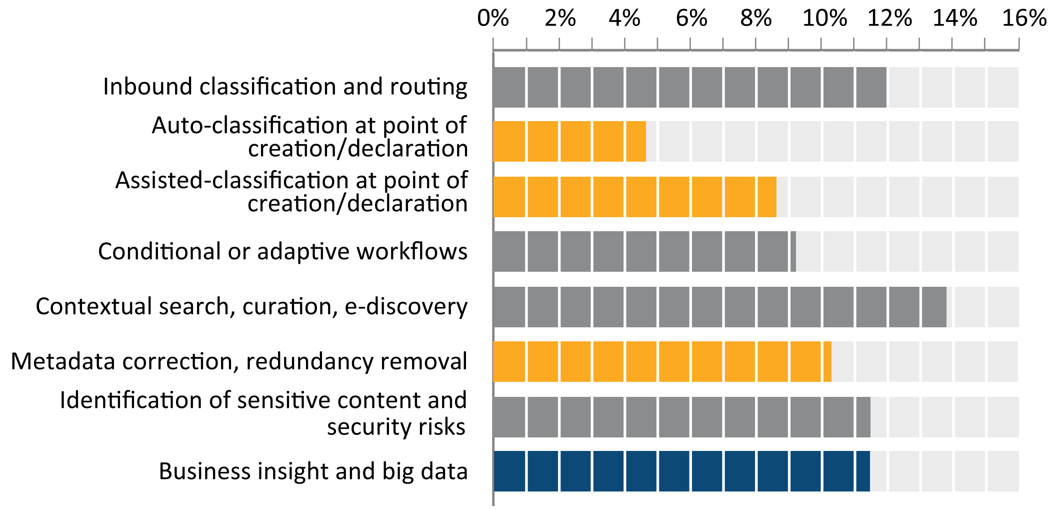
Content Analytics

Content analytics involves extracting information from content (digital or scanned) and using it in an intelligent manner. This can happen at content entry to the organization, at content creation, and at the declaration of a record, or it can be as a post-process across existing data. Post-processing analytics tools are often provided by a third-party, although as we saw earlier, users are looking to have them included within the ECM suite, and they need to have connectors to integrate with the ECM repository.

Use cases for content analytics to enhance and improve the operation of the information management process are fairly well documented, and are listed in Figure 29. Inbound routing is one of the more popular applications (13%) along with search and e-discovery (15%). Combining auto-classification and assisted classification at the point of creation or declaration also has 15% usage. Metadata correction and sensitive content detection are both generally post-processes, at 11% and 12% respectively.

12% (14% of mid-sized and large) are using content analytics for business insight and big data. Here the use cases are harder to determine. They would include sentiment analysis from social media, incident alerts from news feeds, trend analysis from financial statements, open-ended forms comments, security and fraud detection, and many more.

Figure 29: Are you using content analytics for any of the following? (Pick all that apply) (N=164)



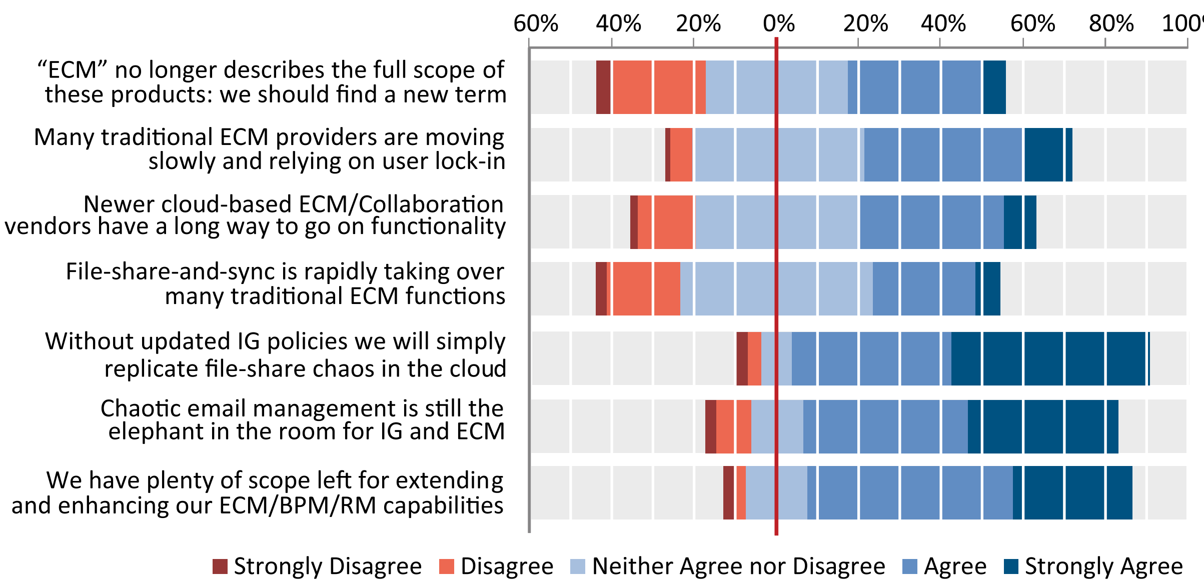
Opinions and Spend

Our "opinions" question is intended to take the pulse of active practitioners and those who are aware of the possibilities but may have more pragmatic issues to solve.

- *36% want to move on from the term "ECM" but 26% feel it is still useful.*
- *50% feel that traditional ECM providers are moving slowly and relying on user lock-in.*
- *But 43% feel that newer cloud-based ECM and collaboration services lack much functionality*
- *31% feel that file-share-and-sync is rapidly taking over many traditional ECM functions. 21% disagree.*
- *87% feel that without updated IG policies, we will simply replicate file-share chaos in the cloud.*
- *76% agree that email management is still the elephant in the room for IG and ECM.*
- *79% have plenty of scope left for extending and enhancing their ECM/BPM/RM capabilities.*

The general sentiment coming through here is that changes are happening within information management technology, and traditional ECM systems are only part of the solution. But we have still to learn the lessons that information governance policies should pre-date system roll-outs, and that file-share and email chaos is still with us - we are simply moving it to the cloud.

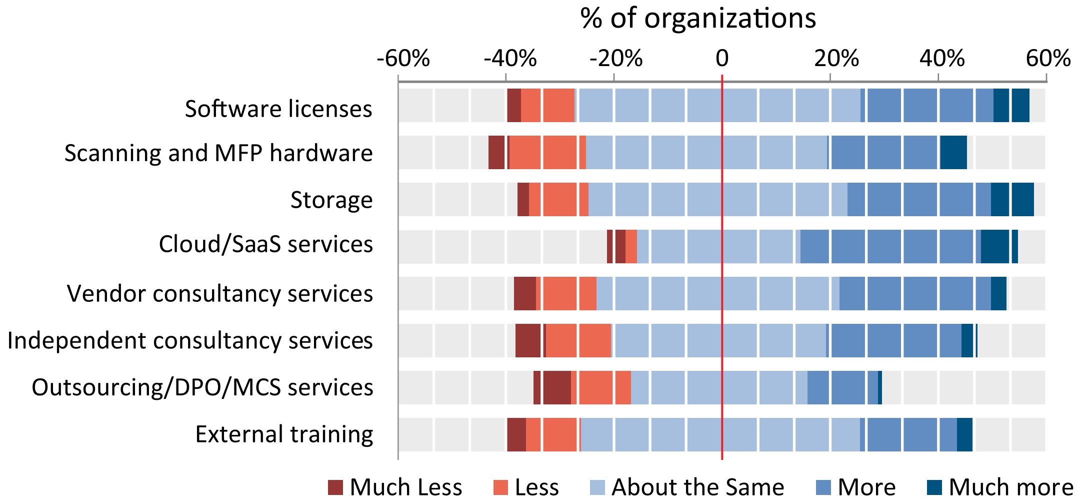
Figure 30: How do you feel about the following statements? (N=155)



Spend

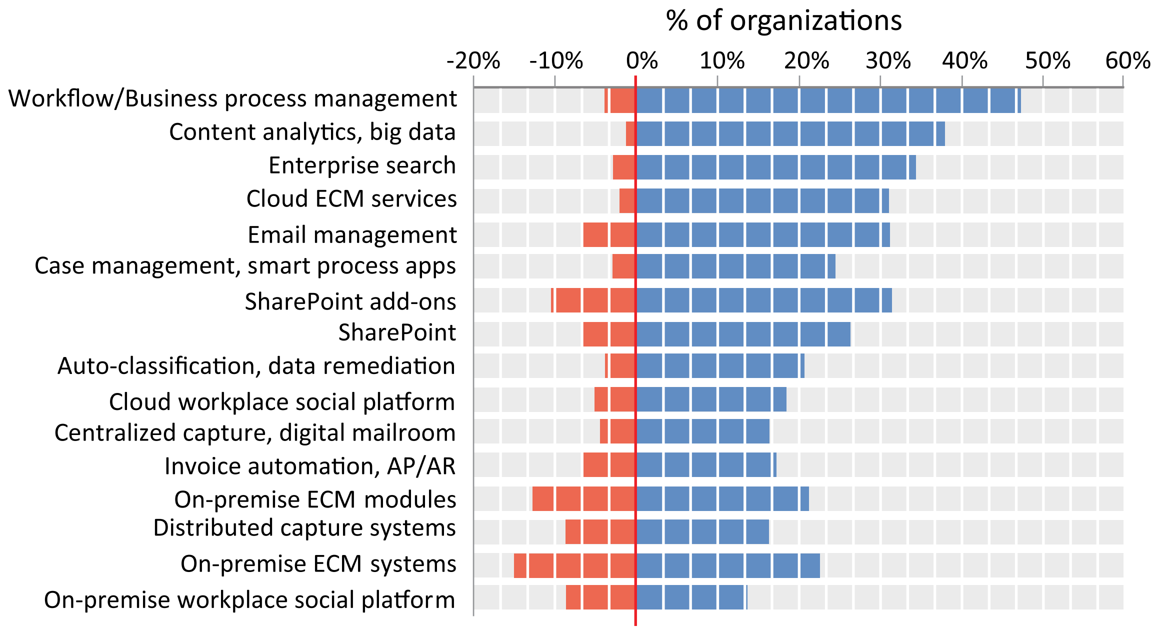
Outsourcing/DPO is the only area where more organizations are indicating reduced spending compared to those intending to spend more. Scanning and MFP hardware show a small net of organizations intending to spend more. Consultancy services (independent and vendor) and external training show a positive increase in numbers. The most positive net spending intentions are on storage (no surprise) and cloud and SaaS services, with conventional software licenses still showing growth.

Figure 31: What are your spending plans for the following areas in the next 12 months compared to the last 12 months? (N=151. Line length indicates "We don't spend anything on this"



When it comes to individual modules (Figure 32), every area is indicating net growth of the number of organizations that are in buying mode, with very strong net positive intentions in workflow/BPM, content analytics, enterprise search, cloud ECM, email management and case management. The survey pre-dates Google's decision to withdraw it's search appliance, so we could expect even stronger growth in enterprise search spending.

Figure 32: How do you think your organization's spending on the following products and applications in the next 12 months will compare with what was actually spent in the last 12 months? (N=282, excl. "Same", ordered by net more)



The outlook for spend on almost all ECM-related products and services is positive. BPM, analytics, search, cloud, auto-classification and email management all seem set for strong net growth.

Conclusion and Recommendations

The evolution of ECM systems has to an extent followed the same path as ERP did ten years before. Initially, individual applications carried out specific information-management tasks: imaging and capture, records management, content creation, workflow, knowledge management, etc. Then as users sought more integrated solutions, vendors began to offer pre-integrated or partnership packages. This shift was closely followed by mergers and acquisitions as the concept of the single-vendor, enterprise-wide, modular ECM suite emerged. Other systems developed initially for project collaboration, publishing or website creation converged onto the ECM "ideal".

This structure has now matured, and has become business-critical in much the same way as ERP, with vendor choice a much more strategic decision. These suites have become massively capable, but also massively complex. Inevitably, users seek more agile solutions, and niche best-of-breed products are quicker to take the technological high-ground, meeting the information-sharing needs of mobile, social and cloud .

And yet, much like ERP, we see that despite inroads from these new cloud-based services, wall-to-wall ECM is still more popular than best-of-breed. But change is happening. Some users split their information management into three tiers, allocating their legacy systems to handle the robust and compliant records requirements, adding new and agile cloud services for collaboration, and using lighter-weight or industry-specific document, project or case management systems in between. In fact as we have seen, for many organizations, records management systems, capture and workflow systems, and business social tools have always been provisioned on a separate basis, but it is important to link them up to a single portal for search, e-discovery and legal hold.

There is, unfortunately, another parallel with ERP, and that is utilization of the available functionality. Despite having invested in systems capable of enterprise-wide collaboration, analytic search, paper-free processes, email governance and strong records management, senior managers seem to lack the will, motivation or awareness to drive through their deployment. As a consequence, many organizations are losing out on huge productivity benefits whilst also leaving themselves exposed to potential compliance and litigation disasters.

Recommendations

- *If you do not already have a comprehensive and up-to-date information governance policy or set of policies, set up an inter-departmental team to create one. However, do not let this justify a long deferment of overall IM strategies.*
- *Audit your current ECM, DM, RM and capture systems against this IG policy, paying particular attention to information access, process support, compliance and security.*
- *If your IM initiatives are stalled or struggle with user adoption, seek senior management assistance to create a new initiative. Ask users what they dislike, and look to improve – perhaps by adding less onerous or automated classification.*
- *In order to cope with constantly increasing volumes, ensure that lifecycles are defined for all types of content in each type of repository, and implement retention and deletion policies that are defensible under your IG policy.*
- *If your systems are clogged up with un-tagged and un-classified content, use content analytic tools to separate the ROT, and then add value to the retained content.*
- *Avoid this problem in the future by using auto-classification or assisted classification tools.*

- *Take a particularly close look at your email retention policies. If you have a ticking bomb of potential liabilities, draw it to the attention of business management rather than IT management.*
- *Audit the inbound content and the way that content is handled. Combine content types and inbound channels into a single electronic feed for downstream processes in order to improve productivity and speed up response.*
- *If your IM systems are unable to match the access, process, security and compliance needs set out in the IG policy, look to re-deploy, consolidate or replace.*
- *Look to consolidate multiple IM systems around a single, cloud-capable, mobile-capable, process-capable system. Alternatively, take a three-tier approach, re-defining the roles for existing systems, adding new capabilities, and integrating them with each other and with core enterprise systems.*
- *If your strategy is not to consolidate, then create an enterprise search capability across the multiple repositories. Invest in search optimization, and look to extend this into content analytics.*
- *As your ECM/BPM/RM systems become more and more business-critical, be sure to keep them up-to-date, taking advantage of the latest capture capabilities and smart processes.*
- *Moving a well-established system to the cloud merely to save on IT resource may not be a compelling proposition, but consolidating multi-site systems around a single cloud installation can solve a number of access, process and ownership issues.*
- *As an alternative, moving the most sharable or collaborative content to a hybrid cloud will make it much easier to connect remote, mobile and third-party users, and may head-off unofficial use of cloud file-sharing sites.*

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1. "ECM Decisions- strategic options for managing, accessing and preserving content."
   AIIM Industry Watch, April 2015.

2. "Connecting and Optimizing SharePoint – important strategy choices."
   AIIM Industry Watch, Feb 2015.

3. "Paper-Free Progress: measuring outcomes"
   AIIM Industry Watch, Nov 2015.

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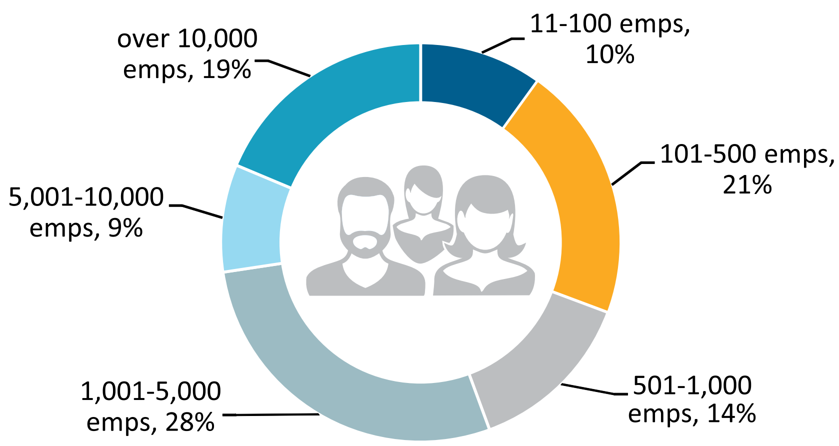
Appendix 1 - Survey Demographics

Survey Background

The survey was taken by 266 individual members of the AIIM community between January 28, 2016, and February 21, 2016 using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 180,000 AIIM community members.

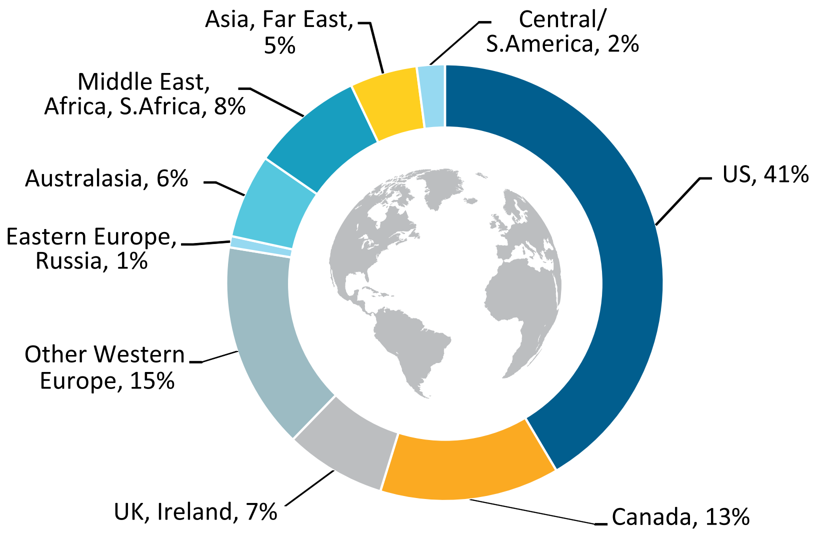
Organizational Size

Survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 27%, with mid-sized organizations of 500 to 5,000 employees at 42%. Small-to-mid sized organizations with 10 to 500 employees constitute 31%. Respondents from organizations with less than 10 employees and those providing ECM products and services have been eliminated from the results, taking the total to 241 respondents.



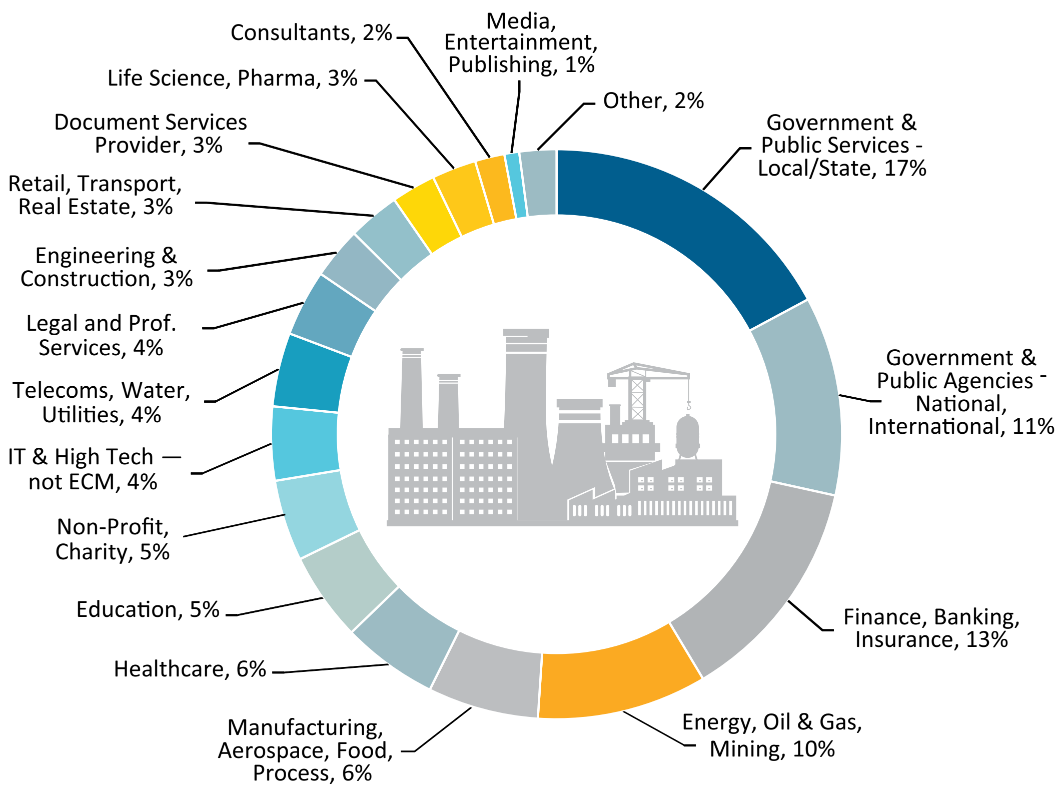
Geography

55% of the participants are based in North America, with 24% from Europe and 21% rest-of-world.



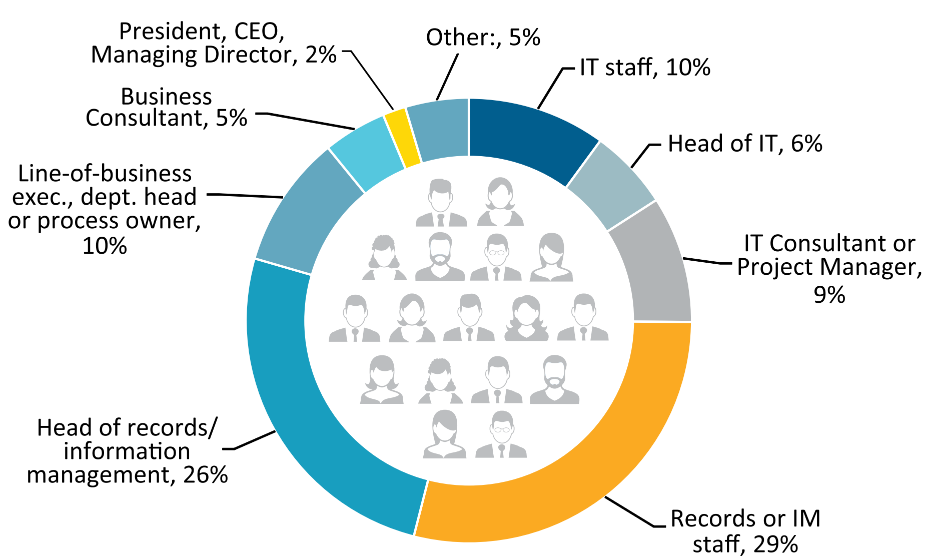
Industry Sector

Local and National Government together make up 28%, and Finance and Insurance 13%, Energy 9%. Other sectors are evenly split.



Job Roles

25% of respondents are from IT, 54% have a records management, information management or KM role, and 22% are line-of-business managers or consultants.



Appendix 2 - General Comments

Do you have any general comments to make about your ECM systems and future strategies? (Selective)

- *IM strategies should focus on the stakeholders, ensuring systems implemented simplify processes and improve on the productivity for the general user. However most IM/IT managers focus too much on technology for the sake of change and are not aware of user needs.*
- *We have a long way to go to get to an integrated, holistic approach to IM.*
- *Future strategies focus on mobile, simplification, and consolidation.*
- *Setting and publishing standards, then AUDITING will help get everyone on the same IG path. Without the audit component, non-compliance and chaos.*
- *I feel like we are still stuck in the 1980's!*
- *The on premise solutions are not flexible, the vendors are not covering the functional gap. So, there is a pressure to take the risk and going to cloud/SaaS. Although we can see huge risks because those solutions are not mature.*
- *Users' focus is changing heavily due to consumerization, and is difficult to follow for traditional IT systems.*
- *Industry change is too fast and arbitrary. Employee's/Leader's bandwidth to absorb and understand the changes is limited.*
- *Convincing IT that content management needs to be a shared role with records management to fulfill administrative, legal and risk needs.*
- *We struggle with a lack of executive level management understanding, buy in and support.*
- *We have had no records/information management program or culture. Organization is asking for it, but doesn't understand the huge business process and culture changes to come!*
- *We need buy in from staff, and support from senior management.*

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- AIIM Wisconsin at The Document Strategy Forum
- Key features to look for in your RM software's document search tool
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