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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. 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 2015, www.aiim.org"

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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. However, the recommendations should not form the sole basis of any business decisions.

The survey was taken using a web-based tool by 434 individual members of the AIIM community between Feb 13, 2015, and Mar 06, 2015. Invitations to take the survey were sent via e-mail to a selection of the 80,000 AIIM community members.

Survey demographics can be found in Appendix 1. Graphs throughout the report exclude responses from organizations with less than 10 employees and suppliers of ECM products and services, taking the number of respondents to 375.

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.

About the Author

Doug Miles is AIIM's Chief Analyst. He has over 30 years' experience of working with users and vendors across a broad spectrum of IT applications. He was an early pioneer of document management systems for business and engineering applications, and has produced many AIIM survey reports on issues and drivers for Capture, ECM, Information Governance, SharePoint, Mobile, Cloud, Content Analytics and Social Business. Doug has also worked closely with other enterprise-level IT systems such as ERP, BI and CRM. Doug has an MSc in Communications Engineering and is a member of the IET in the UK.

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Introduction

The ECM (Enterprise Content Management) concept has been with us now for nearly 15 years, and many of the products stretch back many years before that. Some of these original ECM suites grew from imaging and workflow products, others started with basic electronic document management, adding capture and records management along the way. SharePoint grew from project collaboration and content-sharing intranets to encompass a wide range of active-content management capabilities. Faced with the demands for process management, enterprise search, access beyond the firewall, mobile device support, social interaction, and cloud deployment, the suite providers have moved to add modules and product integrations to enable wall-to-wall content management across the enterprise and beyond.

We will find in our survey results that more than half of organizations still have a vision to achieve a single enterprise-wide system to manage all of their content, but the current reality is that multiple systems and multiple content silos exist across most businesses. The much derided server file-share refuses to go away, and multiple cloud file-sync-and-share systems, often working outside of the information governance regime, are creating even more loosely-coupled information silos. Meanwhile, multi-channel inbound communications and document-centric workflows add another dimension, as they are linked to capture, case management, records management and compliance.

So how do we set a strategy for the future, and do we accommodate, consolidate or federate our existing content systems? How do we align our information governance policies with this varied content landscape, and how do we support our users and business partners for remote and mobile access to both collaborative content and the corporate knowledge base.

In this report we look at how ECM systems have become mission-critical alongside the other pillars of enterprise IT, and how they need to be integrated with these other systems. We also look at how cloud and mobile strategies are playing out. Above all, we look at how all of these factors are influencing the choices for consolidation, enhancement or replacement.

Key Findings

Drivers and Adoption

- **Lowering costs and improving efficiency is the main driver for ECM (40%), with compliance and risk second, dropping slightly since 2013 (33%).** Collaboration (18%), and customer service (9%) vie year-on-year for third place.

- **More than half of responding organizations (52%) are working towards a company-wide ECM capability, but only 14% have completed it.** 16% are integrating across departments and 22% are still in departmental mode.

- **10% are looking to replace existing system(s) with a new one.** 10% of the largest organizations, 13% of mid-sized and 5% of the smallest.

- **62% are still strongly reliant on their file-share**. 1% have turned it off, and 15% have "largely replaced it".

ECM Systems and Strategies

- **52% have three or more ECM/DM/RM systems. 22% have five or more (38% of the largest).** These numbers are a few percentage points up on the 2013 survey, so no evidence of consolidation as yet.

- **For 67% of organizations, ECM/DM is mission-critical, 54% for RM and 40% for capture and workflow.** A third would suffer serious disruption after an outage of just 1 hour, 58% would struggle after half a day of downtime

- **54% are converging on a single-vendor ECM suite, including 21% who may well buy a new one (6% as their first ECM system).** 24% are building on best-of-breed or departmental systems, and 8% are looking at a 2-tier structure.

- **88% see plenty of scope for ECM enhancement, although focus has moved on in 30% of user organizations.** 75% agree that ECM/RM is a fundamental part of their information security regime.

Integration and Process

- **To consolidate content silos, 20% intend to migrate content to ECM, 44% will integrate ECM with other enterprise systems.** 15% will rely on enterprise search or content portals and 16% will continue with separate silos.

- **Currently, 61% have no connection between ECM and ERP.** 24% have a one-way content link, 8% a two-way link and 7% have an AP/AR transaction link.

- **30% have some degree of integrated multi-channel inbound communications, but only 5% are auto-routing to multiple processes.** 22% handle paper and electronic inbound separately.

- **37% prefer their workplace social platform to be an extension or module of their ECM system, rather than a separate best-of-breed product.** Half prefer an on-prem social platform rather than cloud-based.

Cloud and Mobile

- **From a personal view, our respondents are largely in favor of moving ECM content to the cloud (71%), mostly as a small on-prem/large cloud hybrid.** Their organizations are less positive, with 48% in favor of cloud, 28% resolutely against, and 28% with no decision made as yet. The dominant preference is for "private cloud" (71%).

- **39% have some degree of mobile access, but only 5% have widespread access for staff and project partners.** Less than 20% have comment, edit and process interaction capability that is app-based.

Issues

- **The biggest current issues are improving user adoption (45%) and consolidating multiple repositories (42%).** Raising the level of training and expertise figures strongly (30%), as does dealing with emails as records (32%).

- **The definition of ECM is becoming blurred, with 52% agreeing that in 5 years' time, ECM systems will be an undifferentiated part of the IT infrastructure.** Most (63%) currently see their ECM system to be "a compliant home for information" and "a platform for company-wide sharing".

Spend

- **Spend intentions are strong, particularly in cloud/SaaS services, and in storage.** Outsourced bureau services, and independent consultancy services show little net growth.

- **Workflow, content analytics and enterprise search have a strong net demand.** Email management, auto-classification/data remediation, and case management also show very positive spend intentions.

Drivers and Adoption

AIIM has been tracking the primary driver for ECM 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, and so it is today. But in the meantime, compliance and risk has challenged as a driver, particularly in the post-crash period of 2012/2013. We can also see from Figure 1 that customer service as a driver has given way to collaboration, despite the current challenges of multi-channel input and the demand for fast response.

Figure 1: When you consider your document and records management projects, what is the most significant business driver for your organization? *(N=373)*
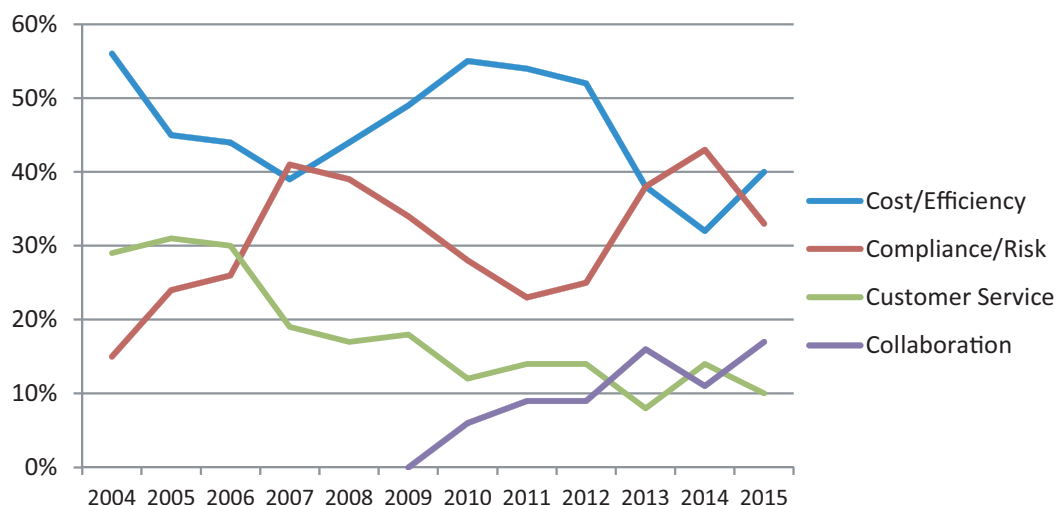
Adoption

We have also charted adoption over many years, and here we need to sound a 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. Therefore the fact that the number reporting a completed company-wide ECM capability has hovered around 14% or 15% over the past 5 years may reflect this. There are also two other factors. Firstly 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". Secondly, we have only in the past two years added the option "Looking to replace" (Figure 2) which this year has jumped to 10% from 5% in 2013[1]. Not unexpected in a mature market, but also reflective of some of the issues we will cover in this report.

Figure 2: How would you best characterize your organization's experience with document management (DM), records management (RM) and Enterprise Content Management (ECM)? *(N=375)*
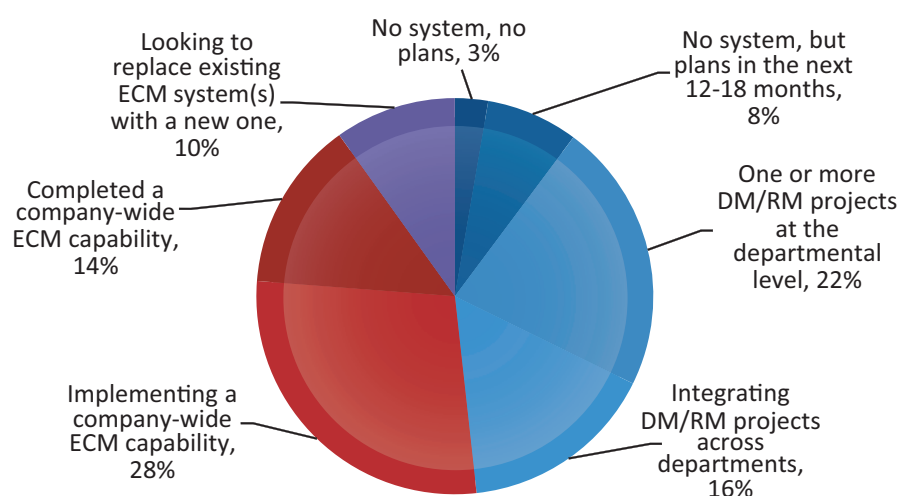
When we look at the adoption rates by size of organization, we see that although smaller organizations have some catching up to do regarding enterprise-wide roll-out, most have plans under way. More interesting is the fact that 13% of mid-sized organizations are looking to replace, and this may be consolidation of numerous DM systems, or moving on from a stalled SharePoint project[2].

Figure 3: How would you best characterize your organization's experience with DM, RM and ECM? *(N=375)*

Legend:
- 10-500 emps
- 500-5,000 emps
- 5,000+ emps

Categories (top to bottom):
- No system, no plans
- No system, but plans in the next 12-18 months
- One or more DM/RM projects at the departmental level
- Integrating DM/RM projects across departments
- Implementing a company-wide ECM capability
- Completed a company-wide ECM capability
- Looking to replace existing ECM system(s) with a new one

Alternatives to ECM

What did we do before ECM? Well, we relied on the file-share, the share-drives, the X:Drive or G:Drive. As we can see in Figure 4, despite mostly having ECM systems, we still make heavy use of the file-share. 62% of organizations are still strongly dependent on the file share as a key repository, including 25% where it is still the most dominant content store. In some organizations, the file-share is rigorously managed for both structure and access rights, but in many cases it is simply a dumping ground for content, with no discipline and a vast quantity of content that is ROT – redundant, obsolete and trivial.

Only 1% have actually turned it off, with 15% reporting that they have largely replaced it with ECM or SharePoint. In many organizations, the ECM system is considered the place for finished or published documents, whereas the share-drive is used for work-in-progress. It is worth bearing in mind all the shortcomings of the server-based file share as it is all too easy for this situation to be replicated in the cloud.

Figure 4: How would you best describe the current status of your network file-share "repository" (X:Drive, G:Drive, Share drives)? *(N=372)*

- We have turned it off, 1%
- We encourage/sanction the use of cloud file-shares instead, 1%
- It is the most dominant content store we have, 25%
- It is still one of our main repositories, 37%
- We have largely replaced it with our ECM/SharePoint system(s), 15%
- It works alongside our ECM system(s) for working files, 20%
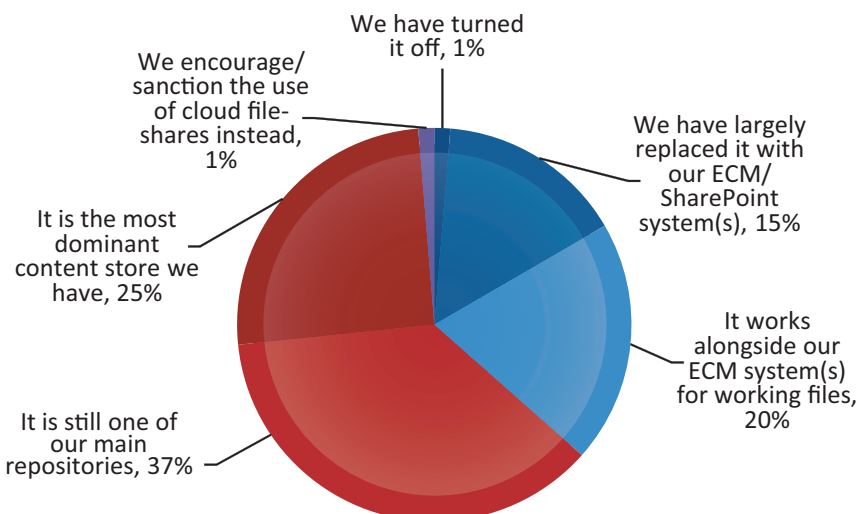
Cloud-Based File Shares

File-share-and-sync services (FSS), whether consumer or business-grade, satisfy a need users have to share and exchange documents both between their own multiple devices, and with other persons who mostly live outside the firewall. We could probably live with this external sharing, especially if we enforced or authorized the use of specific, business-grade FSS services. The problem arises when creating, revising and storing these documents in the cloud takes place in parallel with the on-premise ECM system, by-passing all of the governance rules that have been set around classification, security and retention.

Figure 5: What is your official policy on employees using "consumer" cloud-based file-shares and collaboration systems? (N=364)
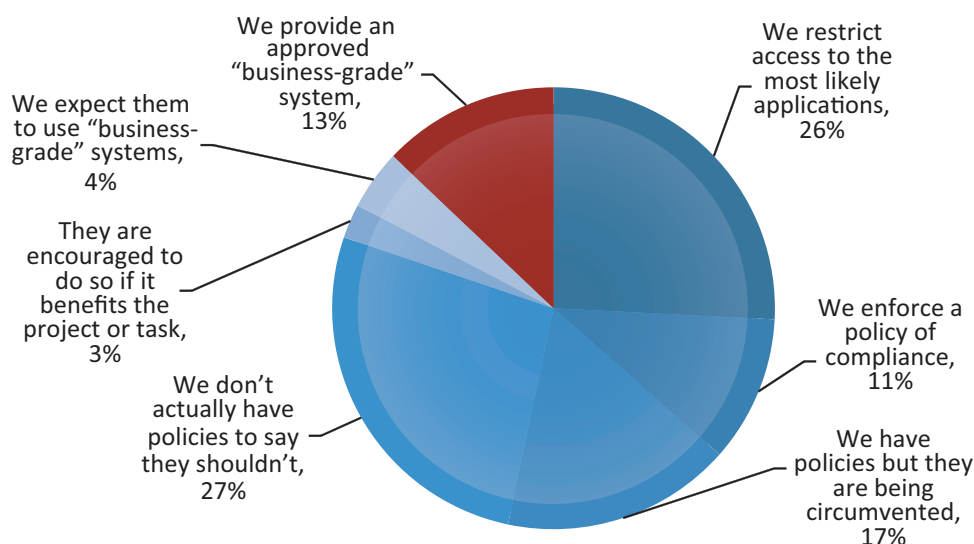
Placing restrictions on consumer FSS systems is fine, but only if you provide an approved "business-grade" system (which only 13% do). You then have some hope of aligning governance between your on-premise content management and your cloud "shares", but it will always be a tough battle to fight.

ECM Systems

Despite the sought-after goal of a single enterprise-wide content management system, most organizations have several: 52% have 3 or more systems and 22% have five or more, rising to 38% of the largest organizations. These may include a classic suite-based system tied to process applications, one or more SharePoint deployments, a dedicated imaging system, and a stand-alone records management system. Despite the call for consolidation, the number seems to be rising compared to previous years – 19% reported having five or more in 2013 compared with 22% today. SharePoint is the strongest player, with 58% of our survey considering it to be one of their primary ECM/DM/RM systems – up from 53% in 2013. The next four products/suppliers range from a 22% to a 13% share, followed by a long tail of over twenty suppliers with a 1% or more share of the installed base.

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 6).

Splitting out the SharePoint users, we can see that Microsoft is moving ahead faster than most users can keep up with, and there are some aspects that users are not happy with (most likely the perceived lack of support for on-prem usage[2]). Other suppliers would seem to be moving at about the right pace, although for a tenth of users, progress is slower than they would like.

Figure 6: How well aligned is the roadmap of your ECM supplier with your own needs and plans?
(N=259 excl. 87 Don't Know or N/A)
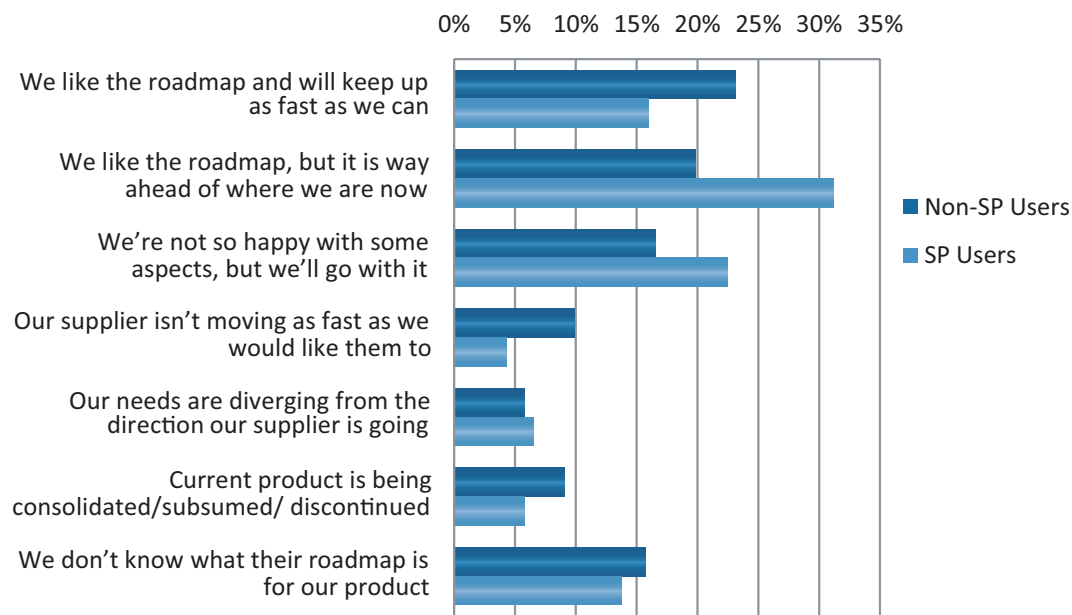
Most organizations (76%) have more than one ECM/DM/RM system or supplier, with 22% having 5 or more. SharePoint is the dominant presence in the installed base, with 58% considering it to be one of their primary ECM/DM/RM systems, but there is considerable overlap with other suppliers.

ECM Strategies

Despite the obvious difficulties of deploying a single, enterprise wide ECM suite, 54% of our responding organizations have set that as their strategy, rising to 62% of those who actually have a strategy. Of these, 7% would be investing for the first time, and 18% would be looking to replace an existing system with a new one. (This number is higher than the 10% cited in Figure 2, but here we are talking of future strategy rather than immediate plans). These numbers are very similar to those of our 2013 survey[1], although the number looking to migrate to a new ECM suite has risen from 13% to 18%.

15% have a clear plan to build on best-of-breed products, whereas 9% are taking a more ad hoc approach in upgrading or replacing departmental systems as the need arises. There is a recent development of so-called "two-tier ECM" where an overall enterprise-wide system provides a parent portal into more diverse departmental or specialist systems.

Figure 7: How would you best describe your ECM/DM/RM strategy going forward?
(N=331 excl. 20 Don't Know)
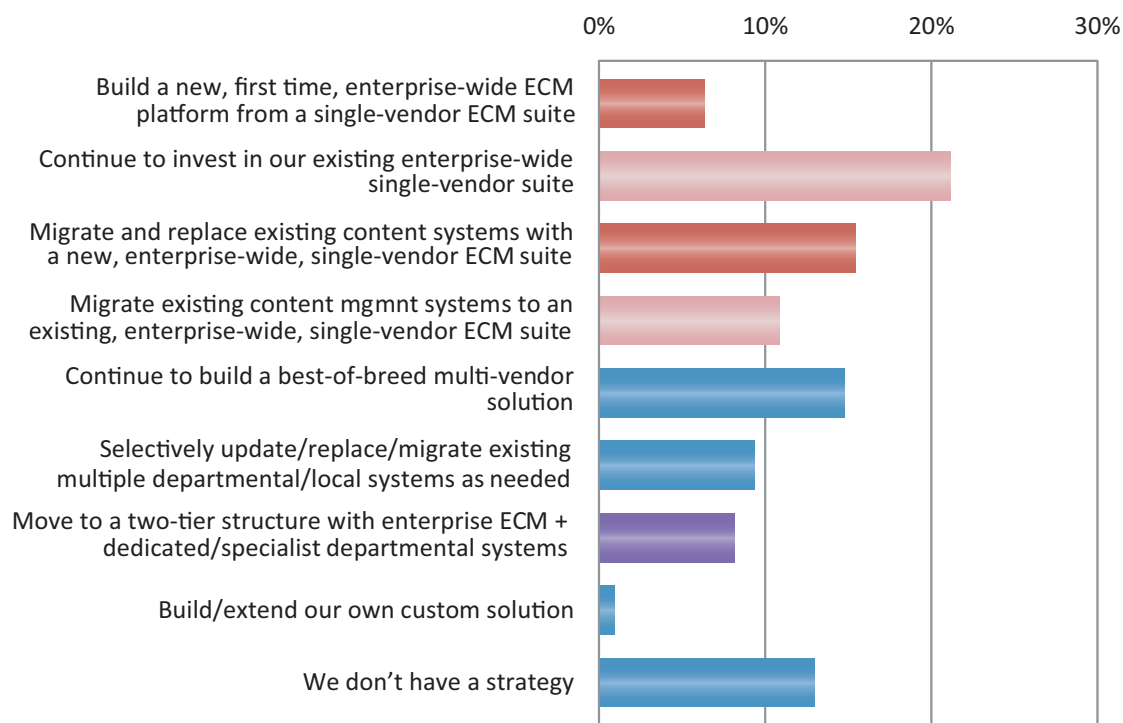
When it comes to the scope of ECM functionalities, we see in Figure 8 that around 35% have deployed suite modules for enterprise search, records management, BPM/workflow, and metadata management, with a further 10% using integrated add-ons for these functions (most likely with SharePoint). Of the 56% using inbound capture, around a third are using a module, a third an integrated add-on, and a third stand alone. For email management or archive, on the other hand, more than half have a stand-alone solution, with only 15% having this capability as part of the ECM suite. Case management, e-discovery and cloud collaboration are as likely to be stand alone as they are to be part of the suite, and only 8% are utilizing suite-based content analytics.

Figure 8: Which of the following ECM functionalities do you have deployed, and in what way? *(N=337)*
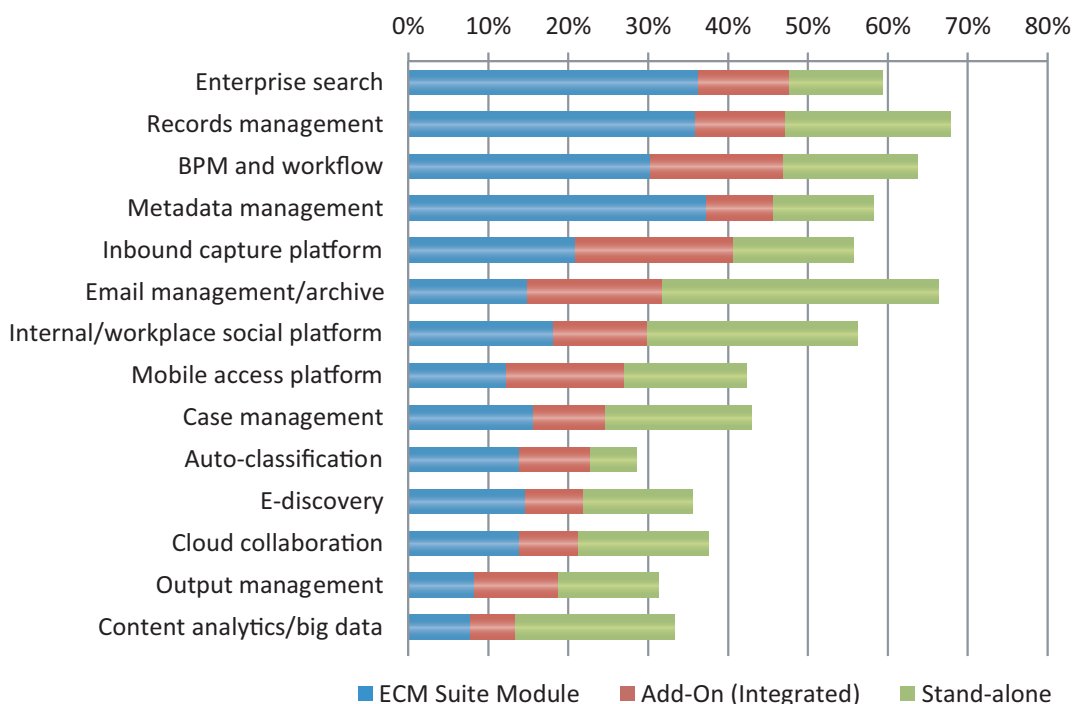
Business Critical

When the term ECM was coined (by AIIM) some 15 years ago, it was intended to align the business importance of unstructured content management alongside the standard enterprise heavyweights of Finance, ERP and CRM. One way to measure this is the dependency of the business on such systems. We first asked (Figure 9) which content systems or operations our respondents feel are "business-critical".

Figure 9: Which of the following content systems/operations would you consider to be business critical for your business in terms of availability? (Select all that apply)? (N=346)
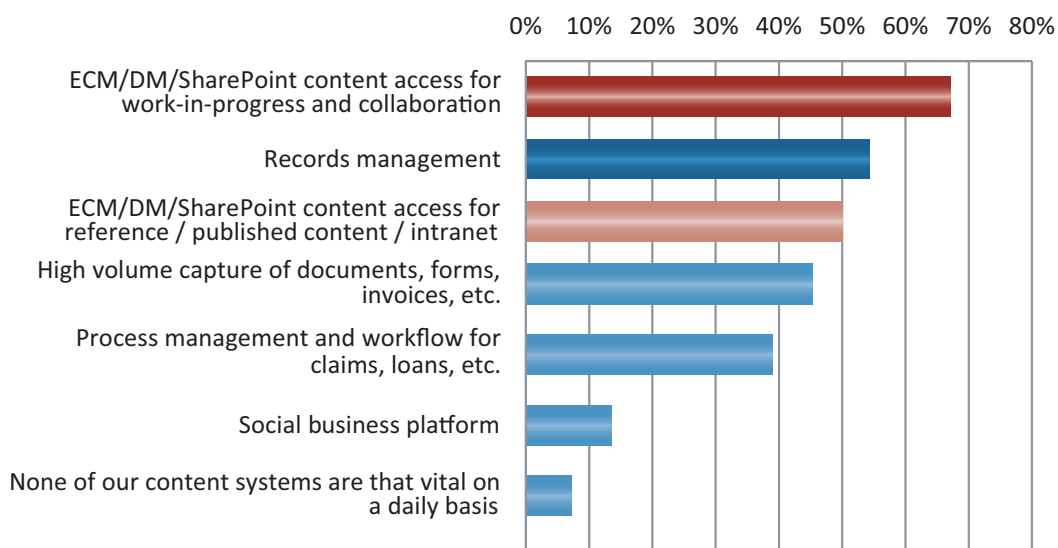
The collaborative element of ECM for work-in-progress is considered business critical for 67%, and 50% feel the use of ECM for reference content or as a knowledge-based intranet is vital, but 54% of our respondents also consider records management to be critical to the business. Less surprising, perhaps, is that the 45% using ECM functionality for high volume document capture and process workflow need very high availability.

"Business critical" can be an imprecise term, but we then asked users to quantify how long before ECM downtime or malfunction would cause serious disruption, 33% said on hour or less, with a total of 58% struggling if their ECM capability were to be out of action for more than half a day. 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 10: How long before a system outage or major slowdown of your most critical content application would cause serious business disruption? (N=331)
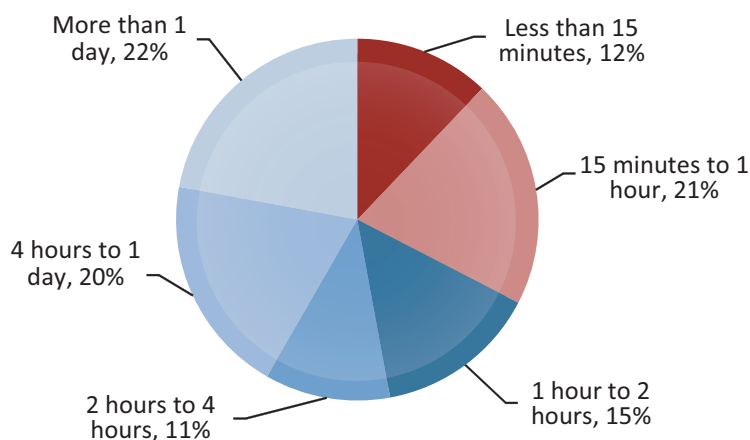
Consolidating Content

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, and these 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. There are a number of alternative approaches, ranging from regular migration to the ECM system, through various levels of integration, to enterprise search alone.

Figure 11: What is your strategy to address the issues of content stored within other enterprise systems? *(N=328)*
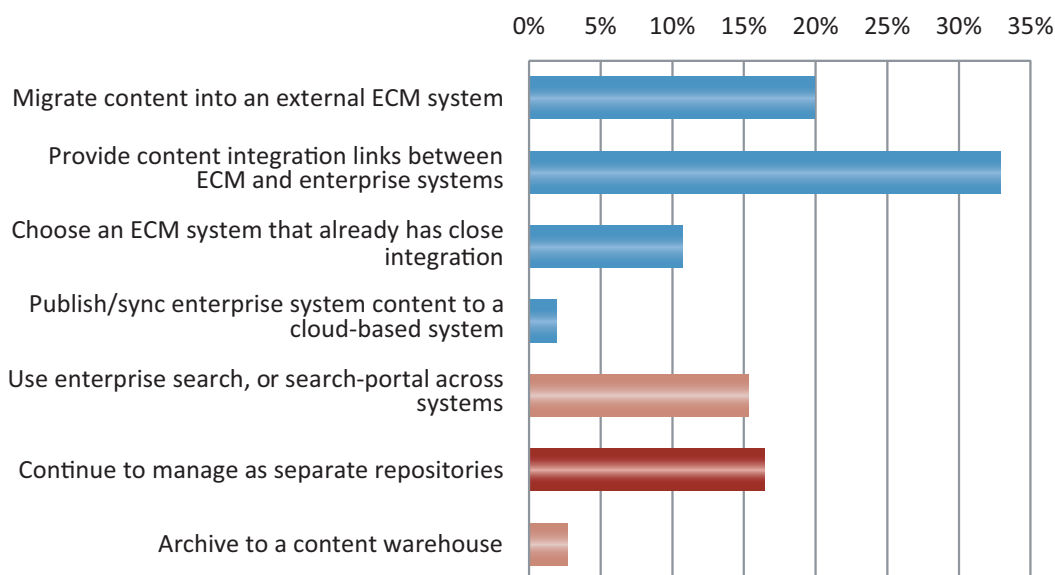
Integration with ERP and Finance systems is particularly useful for applications ranging from automated accounts payable, through contract and bid management, to case management and asset management. All of these are likely to generate considerable quantities of supporting documents, contracts, drawings and specifications that need to be recorded and managed for their lifecycle, but also to be searchable and accessible by a range of employees within the business and, in many cases, by partners outside of the business.

Figure 12: How closely coupled is your ECM/DM/RM system to your ERP/Finance system? (Check all that apply) *(N=323)*
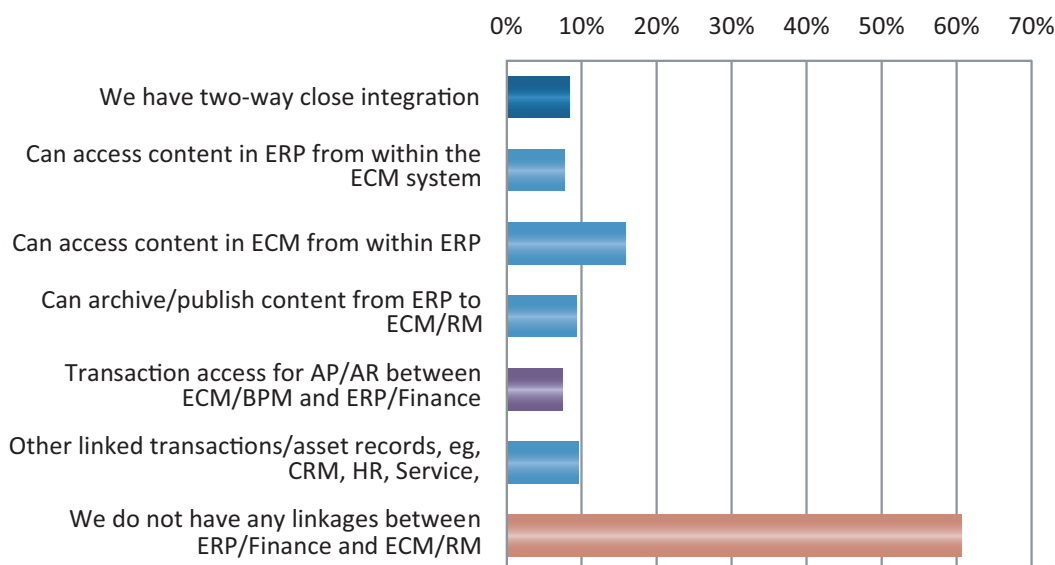
Only 8% have two-way close integration between systems, thereby avoiding multi-screen working, or print and re-key. For some businesses, productized integration with say SAP or Oracle EBS is a key purchasing factor. Only 9% can immediately commit a record from within ERP to records management. Surprisingly, given the popularity of automated AP, only 7% have transaction access to match invoice content between ECM/BPM and the finance system.

Two-thirds of organizations consider their ECM/RM systems to be mission-critical. A third have a critical downtime of one hour or less before serious disruption to the business occurs. For those with close integration to ERP, CRM or finance systems, ECM is even more business critical.

Process

ECM systems can play a key role in a range of business processes, and we have seen that workflow/ BPM is a key area for enhancement of existing systems. Capture systems, image workflow, and OCR data extraction have been core components of ECM suites for many years, contributing to the move towards paper-free processes. However, despite the many advantages of going paper free[3], particularly in this age of response-driven business, most organizations (64%) have a long way to go before they have addressed all of the processes that are potential candidates.

Figure 13: What is your policy for creating paper-free processes? (N=322)
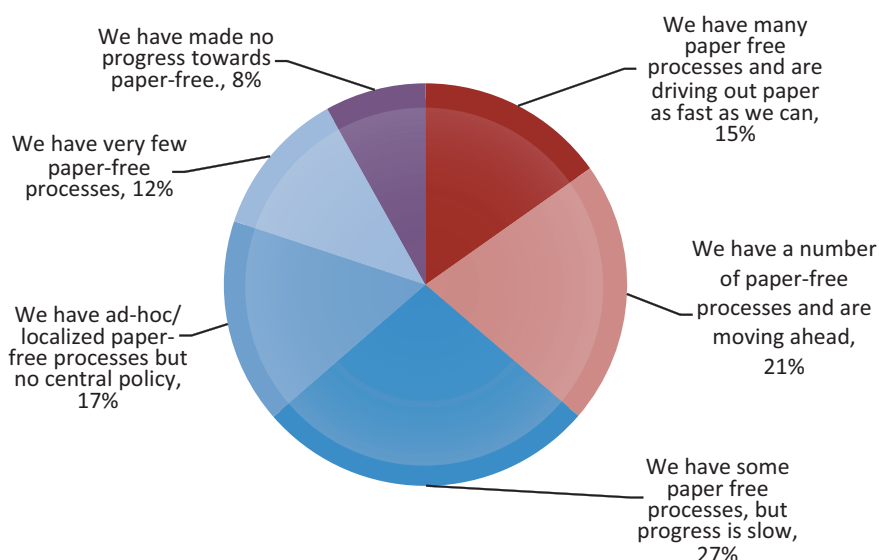
We discussed earlier that capture and imaging are core to many ECM systems, and ECM suite suppliers have been acquiring capture vendors for the last 10 years, including a major deal very recently. However, only 25% of organizations have implemented capture this way, plus a further 17% who plan to bring them together in the future. For 18%, they will stay separate, and 23% have no capture and image workflow.

Figure 14: How would you describe the integration between your capture and scanned-image workflow system(s), and your main ECM content management system? *(N=319)*

- We don't have capture and image workflow, 23%
- They are pretty much the same system, 25%
- We have capture and image workflow, but have nothing you could describe as ECM, 11%
- We plan to bring them together in one system, 17%
- They are mostly separate systems and are likely to remain so, 18%
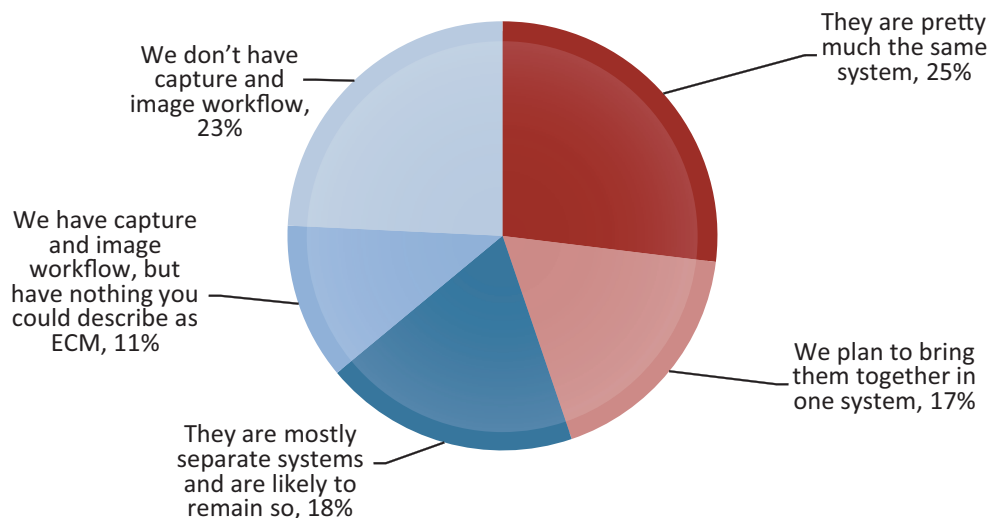
Multi-Channel Inbound Capture

As customer communications spreads across many channels – paper, email, SMS text, and social - the role of the capture system has been extended to pull together all of these inputs and present them either to line-of-business processes, or to customer service desks. Capturing and analyzing text in these messages can automate routing, and in many cases, so called "trailer documents" such as proof of identity, can be automatically archived. Obviously this would not be applicable to all types of business, but even at the basic level of invoices, some will arrive on paper and some electronically, and combining them together and routing them to the same process achieves a considerable improvement in uniformity and flexibility. Despite this, 22% of organizations process them separately, and 49% have somewhat ad hoc arrangements.

Figure 15: How do you deal with multi-channel inbound communications? *(N=300)*

- Multi-channel platform with automated routing to multiple processes
- Multi-channel platform with largely manual routing
- Combined some of our inbound channels for capture
- Digital mailroom capturing inbound mail
- Separate routing and handling for paper, electronic and social
- Largely ad hoc
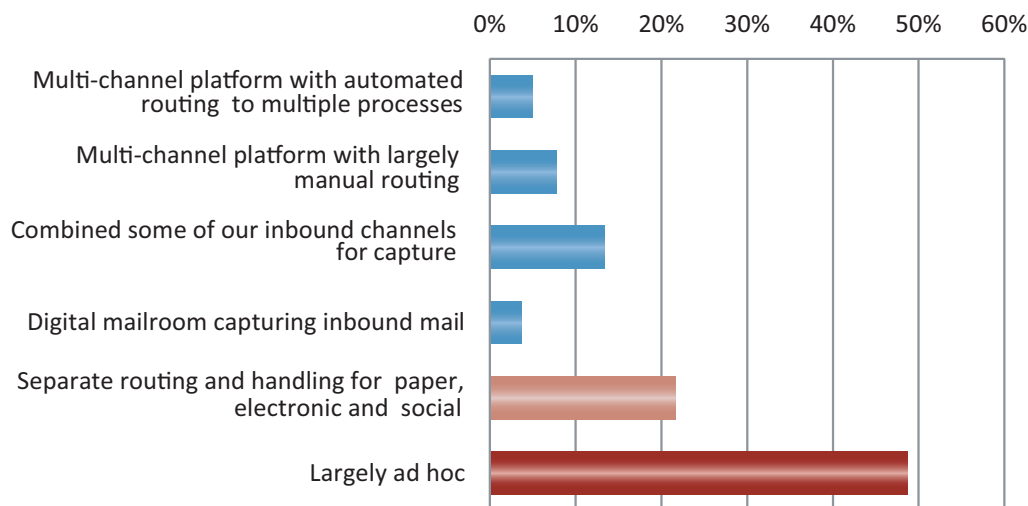
71% of organizations have scanning and capture systems, and for 25% capture is incorporated in their ECM system, but only 36% are making significant progress towards paper-free processes, and only 30% have integrated multi-channel inbound capture.

IG and Records Management

As the wider requirement for information governance (IG) has come to the fore, driven by the needs of security and privacy, the role of the ECM/RM system has become even more important, and 75% of our respondents agree that ECM/RM is a fundamental part of information security. Records management has been a core element of ECM suites for many years, although it took several releases before a satisfactory records capability was added to SharePoint. Even now, only 29% utilize records management within their ECM/DM system. A further 20% have it, but have yet to turn it on – suggesting perhaps that a lack of expertise in RM methodologies is holding users back.

Figure 16: How would you describe your mechanism for managing electronic records? *(N=318)*

We don't really have much RM for electronic records, 19%

Incorporated in our ECM/DM system, 30%

Different departments have adopted quite different approaches, 17%

Plan to add/turn-on records management in our ECM system in the next 12-18 months, 21%

Separate systems for active content management and records management, 10%

We have RM capability in our ECM/DM system but no plans to use it, 3%

One of the issues we have seen with many SharePoint installations is a lack of alignment with information governance policies[2]. Taking the broader picture with this survey, things are improved somewhat, with 29% having good alignment, and a further 35% with a fair degree of alignment, although this cannot be considered a satisfactory situation. This leaves 9% with little alignment, and 27% who have an ECM system, but no IG policies.

Figure 17: Are your ECM/RM decisions driven by a set of agreed and supported Information Governance (IG) policies? *(N=307, excl. 7 Don't Know)*

No, we don't have much in the way of IG policies, 27%

Yes, and they have been for some years, 16%

Yes, we recently agreed/revised our IG policies, 13%

No, they are not well aligned, 9%

In some areas, but not all, 35%
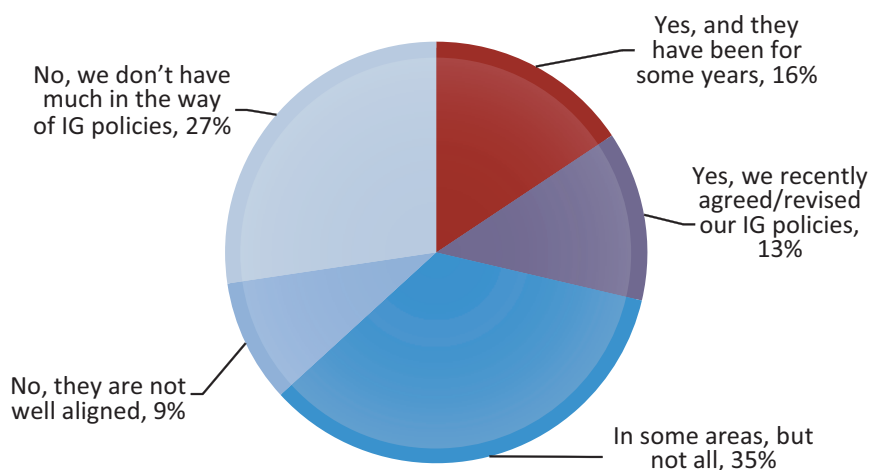
Managing Emails as Records

Email management has been something of an "elephant in the room" for the ECM community. Users are wary of ingesting large quantities of email into the ECM or RM system, and yet the biggest records-related issues coming to court these days almost always come down to emails. The first thing most lawyers need to do is discover what relevant emails there are in "the archive" and place a legal hold on them to prevent them being deleted. If they have been deleted, then the court will need to see that a defined retention and disposition policy has been in place, and has been adhered to.

Looking at the list of "archive" mechanisms detailed in Figure 17, we can see that there is a wide variation in practice here. The three most prevalent practices are keep everything (14%), delete everything after a defined period (13%) or put everything into a dedicated email archive with no retention and hold capabilities (15%). Only 14% are storing emails as records in their ECM/RM/SP system, and only 3% are automating that process, which is likely to be the only sustainable way to deal with the increasing deluge of emails.

Figure 18: How do you currently manage emails as records? (N=369, one answer only)
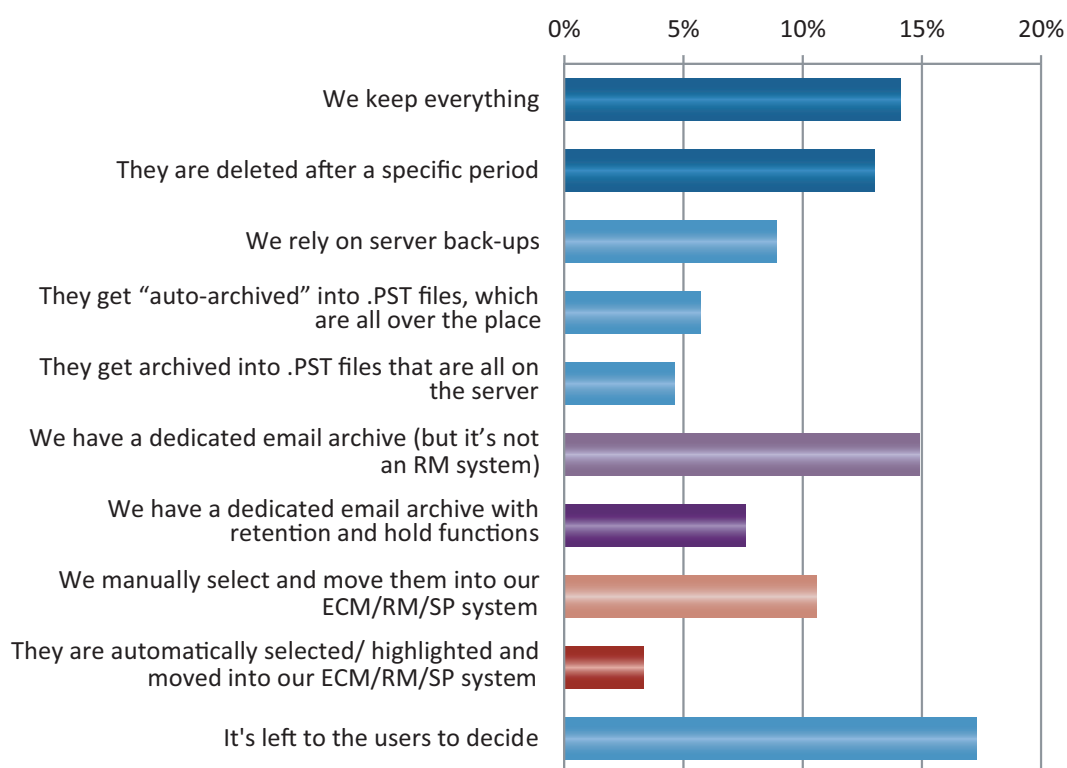
Workplace Social Platforms

From its early collaboration and intranet focus, SharePoint seemed to be an ideal platform on which to build internal news streams and commenting threads. Meanwhile, many ECM suite vendors also felt that collaboration around documents and projects needed to be simplified and improved, and therefore most have acquired and incorporated dedicated social platforms as part of their ECM offering. Three years ago, Microsoft took the unusual step of acquiring Yammer, and making that their preferred social platform. However, our respondents are evenly split. 37% prefer to go with a module or extension of their ECM system and 36% would choose best-of-breed from another supplier. 28% have no plans to deploy workplace social.

Overlaid on that is a rather curious aspect that, of those who do plan to deploy, half state a preference for on-premise hosting rather than cloud.

Figure 19: Going forward, what would be, or is likely to remain, your preferred source for your main internal/workplace social platform? *(N=271, excl. 51 Don't Knows)*

We have no plans to deploy a workplace social platform, 28%

A 100% cloud service from our ECM supplier for both content and social, 6%

A cloud service from another supplier, with content synch'd to our on-prem system, 6%

A cloud-hosted module/ extension of our ECM system, 11%

A separate, best-of-breed cloud service, 14%

A separate, best-of-breed on-premise system, 16%

An integral part or module of our ECM system, hosted on-prem, 20%

Cloud and Mobile

We have watched the increasing acceptance of cloud as an important aspect of IT infrastructure over many years, although the number of organizations actually using it for their main content storage is still less than 20%. For this survey, we wanted to see how the view of individuals in the AIIM community might differ from those of the organizations they work for. What we found, Figure 20, is that individuals are more likely to have made up their mind, and are much more ready (71%) to put ECM content into the cloud, particularly with a small on-prem, large cloud hybrid model. It should be noted that 42% of organizations have made a positive vote for cloud, but as we will see, this is predominantly for a "private cloud" model.

Figure 20: How do you feel about moving ECM content to the cloud, and what is the company's view? *(N=174)*

Legend:
- Respondent View
- Company View

Categories:
- We should/will/have moved to 100% cloud
- A small on-prem/large cloud hybrid would give best-of-both worlds
- A large on-prem/small cloud hybrid for collaboration is preferred
- Our ECM content will/should stay on-prem for the foreseeable future
- No decision made as yet
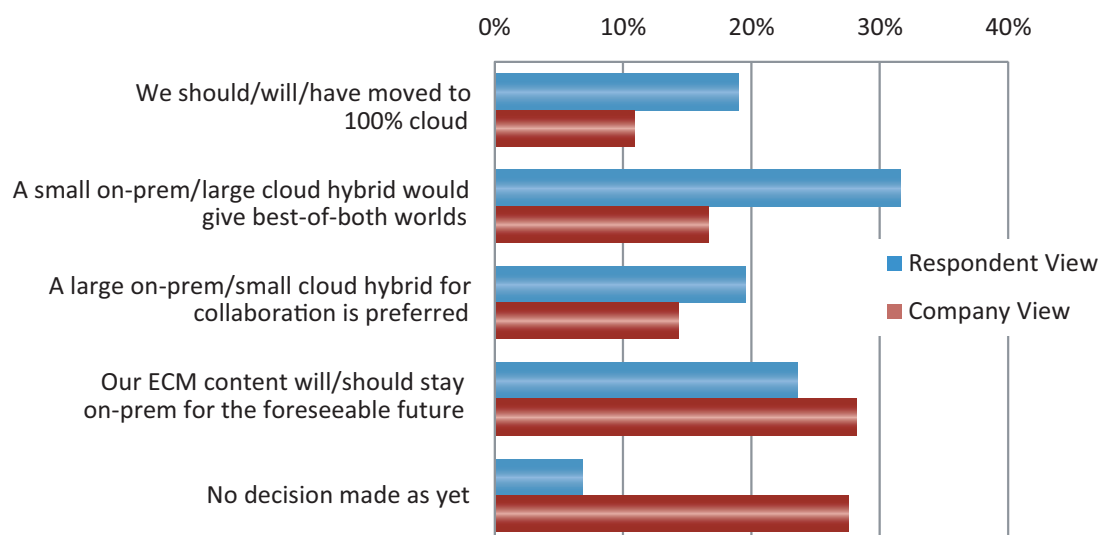
Private vs. Public Cloud

Our view of what people are signing up for here needs to be corrected. When 46% say "cloud", they are referring to virtualized servers in their own, albeit centralized, data centers. A further 25% would outsource those data centers, but their "cloud" would still, in effect, be behind their own firewalls.

A further 11% would like to feel that their data is held on specific servers, albeit hosted by their ECM provider. Only 11% would be comfortable with a multi-tenanted public cloud provided by their ECM provider – which is, of course, what Microsoft are offering with their SharePoint 365 product.

Multi-tenant/public cloud options provided by our current ECM provider, 8%

Multi-tenant/public cloud with a new ECM provider, 3%

None of these, 6%

Hosting on defined-servers in specified locations by our ECM provider, 11%

Private cloud, virtualized servers in our own data centers, 46%

Private cloud, virtualized servers in outsourced data centers, 25%
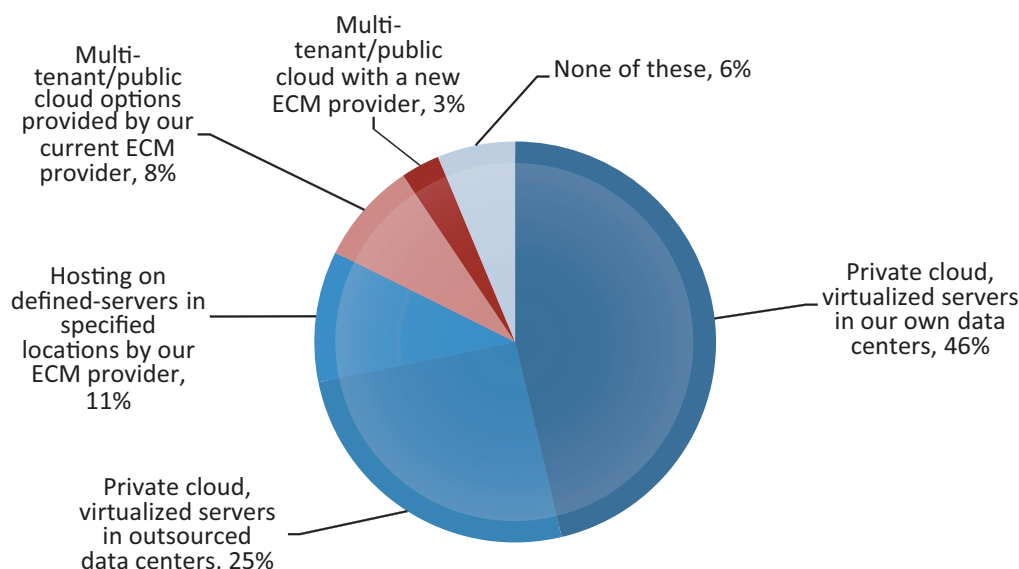
We tried to explore further just how "cloud-like" these private options would be, and for a third it would be the standard on-prem software run on virtualized servers. The rest suggest varying levels of: self-service deployment (36%), multi-tenanting across divisions (25%), works with mobile apps (37%) and standardized (non-custom) configuration (51%). We will explore this further in a future Industry Watch on cloud and mobile.

71% of respondents support cloud-deployment of ECM, mostly as a small on-prem/large cloud hybrid, but nearly three-quarters of these would be more comfortable with a private cloud hosted in data centers under their own control.

Mobile Access

For most end-users of ECM systems, cloud or no-cloud is not the issue. It is all about access to ECM content on mobile devices. Beyond that, line-of-business managers would like to extend interaction with on-prem processes to field workers and business partners, capturing content early on in the process, and speeding up commenting and sign-off cycles. Although 29% are in the process of planning or rolling out mobile access, only 39% currently provide mobile access of any sort, and only 11% would describe that as universal access across all staff, with just 5% also providing mobile access to project partners.

Figure 22: What progress are you making towards content and process access on mobile devices? *(N=324)*

Category	Percentage
Widespread access for staff and project partners	~5%
Most staff are able to access content and processes on mobile	~7%
Mobile access to ECM content for those that need it	~11%
Ad hoc across different content systems	~18%
Rolling out mobile access	~14%
Plans for mobile access in the next 12-18 months	~17%
Nothing planned as yet	~27%
We will not allow mobile access to our on-prem content	~7%

When it comes to what employees are actually able to do with content on their mobile devices, many are restricted to search and view access, and this may well be through the browser rather than a dedicated app, limiting offline capability. 17% support the much needed comment and edit capability using an app, and 19% allow interaction with processes and approval cycles, although only 12% have dedicated mobile e-forms for initiating or interacting with on-prem processes. 55% have no app-based capability.

Figure 23: Which of the following app-based capabilities do you have on mobile devices? *(N=303)*

Category	Percentage
Search and view access to content stored in ECM	~26%
Secure, containerized storage on mobile for off-line content access	~11%
Comment and edit capability on mobile	~17%
Able to interact with processes/approval cycles	~19%
Can create content (docs/photos/videos) directly into ECM/workflow	~13%
Camera-scanned forms input	~8%
Mobile e-forms initiating, or related to, on-prem process	~12%
None of these	~55%

Only 39% of organizations have any form of mobile access to ECM content, although 29% are working to achieve this. Many are still only looking at search and view access on browser, rather than content interaction using apps.

ECM Issues and Plans

We have explored the scope and impact of ECM systems across the enterprise and beyond, and the overall strategy for the future, but in this section we will look at current issues and more specific plans for individual capabilities and extensions.

The first thread we see in Figure 24 is that user adoption is a big issue, and that more staff training would be a way to improve things. Turning off the file-share and banning cloud file-share-and-sync would be another option, but one that's unlikely to win any friends. Further down is the idea of using auto-classification to take away some of the filing issues that staff have.

Next on the list of issues comes consolidating and connecting multiple repositories which now has to take account of cloud-based ECM, or other cloud-based enterprise systems, particularly CRM. For 32%, dealing with emails as records is a problem that is still not solved, although agreeing an IG policy might improve thinking here.

Figure 24: What would you say are your three biggest current issues with your ECM system(s)? (N=304)
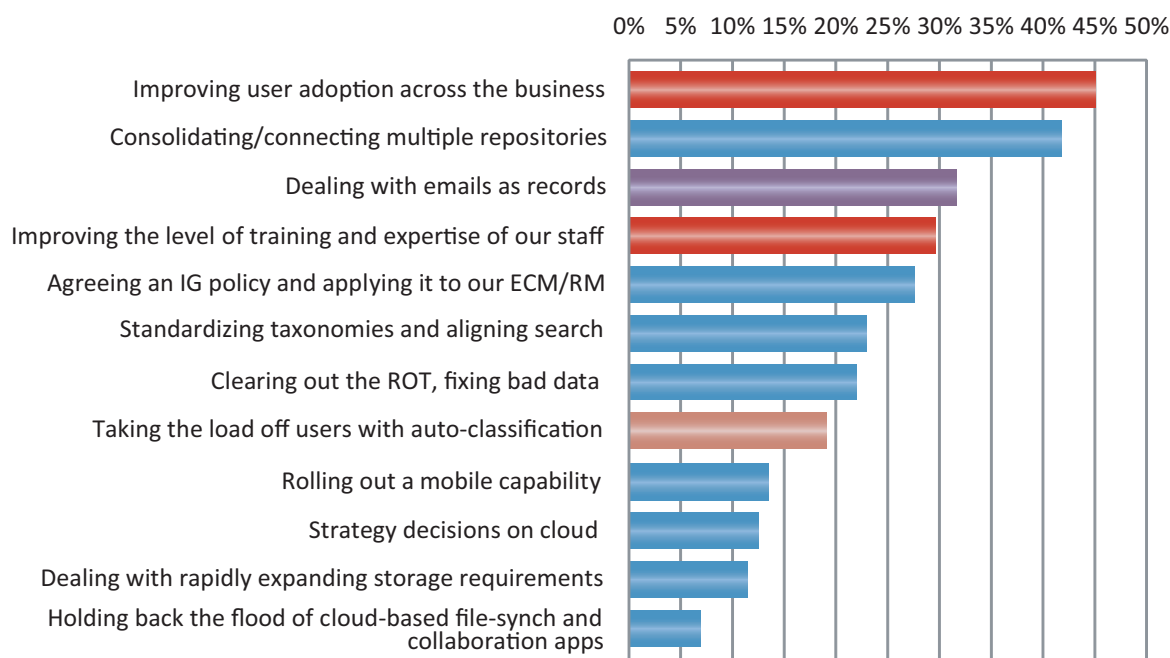
Plans for ECM Sub-Systems

Breaking down ECM into its sub-systems and modules, we see (Figure 25) that connectivity and integration issues are prime concerns. Achieving a single sign-on portal across multiple repositories is a popular goal, followed by BPM to manage multiple processes. The areas set for the strongest growth are federated search/analytics across multiple repositories, unified records management services underlying multiple systems, and/or manage-in-place records management, all of which speak to solving the issues of finding and managing content that resides in non-ECM systems, and managing some as records.

Figure 25: Which of the following ECM sub-systems do you have deployed now/plan to deploy in the next 12-18 months? *(N=307)*

Single sign-on access portal across multiple content systems

Business Process Management (BPM) managing multiple processes

Dedicated email management/archive

Image-enabled workflow and routing

Federated search/analytics engine across multiple repositories

Internal/workplace social platform

Unified capture platform across multiple input channels (paper, fax, email, social, etc.)

Unified records management archive underlying multiple systems

Manage-in-place records management across multiple repositories

User interface improvements using Outlook, Explorer, etc.

Case management with automated and adaptive processes

General content archive or content warehouse

Integrated output management system for multiple outbound communications

None of these

■ Now ■ Plan 12-18 months

Functionality for the Future

As an indicator of where current ECM systems may be found wanting, we asked our respondents what would be their key requirements if they were to be acquiring a new system. S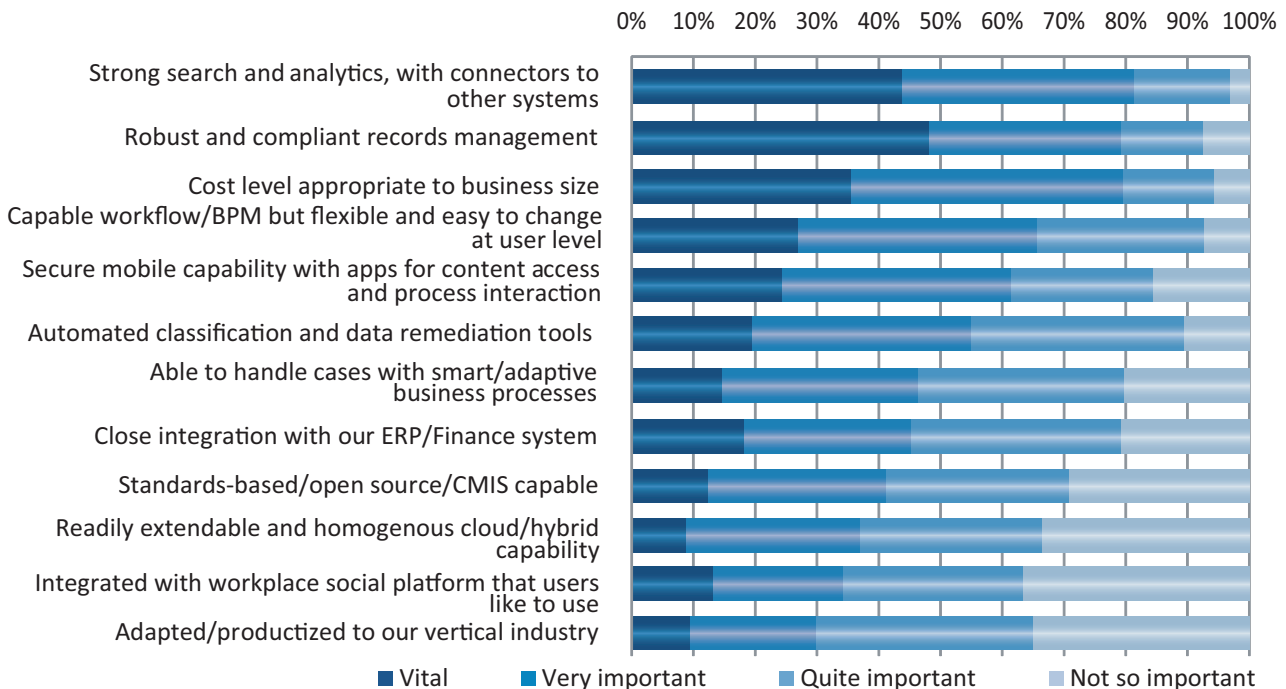trong search and analytics comes top, particularly in a way that can be extended across other systems. Robust and compliant records management is another requisite, and we know from our SharePoint survey[2] that users would like this to be straightforward to implement, rather than requiring customization or add-on products. Capable workflow and BPM is a requirement, but it must be flexible and easy to change without resource to coding or expensive consultancy. Mobile apps, automated classification and smart business processes are all highly desirable.

Figure 26: If you were considering a new, replacement or consolidated ECM system, how important would each of the following aspects be? *(N=300)*

Strong search and analytics, with connectors to other systems

Robust and compliant records management

Cost level appropriate to business size

Capable workflow/BPM but flexible and easy to change at user level

Secure mobile capability with apps for content access and process interaction

Automated classification and data remediation tools

Able to handle cases with smart/adaptive business processes

Close integration with our ERP/Finance system

Standards-based/open source/CMIS capable

Readily extendable and homogenous cloud/hybrid capability

Integrated with workplace social platform that users like to use

Adapted/productized to our vertical industry

■ Vital ■ Very important ■ Quite important ■ Not so important

Improving user adoption and getting them to comply with IG policies is the biggest business issue. Connecting search across multiple repositories and silos, and extending governance to these content stores is the biggest technical requirement.

Opinions and Spend

Most of our respondents (86%) feel that there is plenty of scope left for extending and enhancing their ECM/BPM/RM capabilities, although in some organizations (30%), the management focus on ECM has moved away. There is general agreement (net 21%) that "information governance" is now the major topic, not "information management." However, 75% agree that ECM/RM systems are a fundamental part of the information security defenses which are under huge scrutiny in most organizations right now.

There is a view that ECM is moving to become part of the IT infrastructure, and some would argue that in the cloud, ECM becomes the file system or operating system.

Figure 27: How do you feel about the following statements? (N=302)

- Strongly Disagree ■ Disagree ■ Neither Agree nor Disagree ■ Agree ■ Strongly Agree
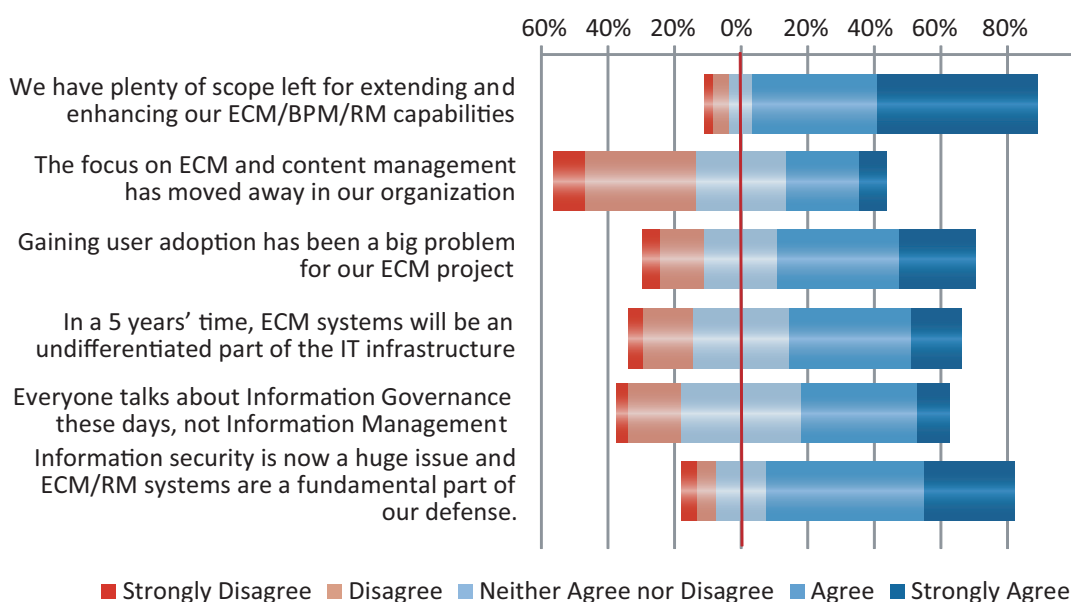
Spend

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

Figure 28: What are your spending plans for the following areas in the next 12 months compared to the last 12 months? *(N=291, excl. "Same")*

Legend: ■ Much Less ■ Less ■ More ■ Much More
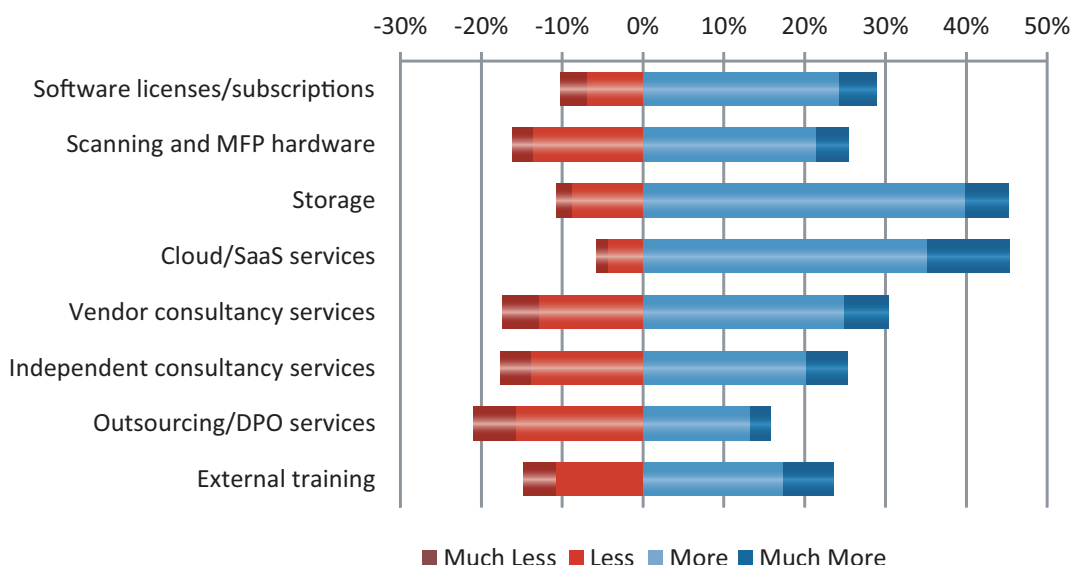
When it comes to individual modules (Figure 29), every area is indicating growth of the number of organizations that are in buying mode, with very strong net positive intentions in cloud, search, content analytics, auto-classification and workflow/BPM.

Figure 29: 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")*

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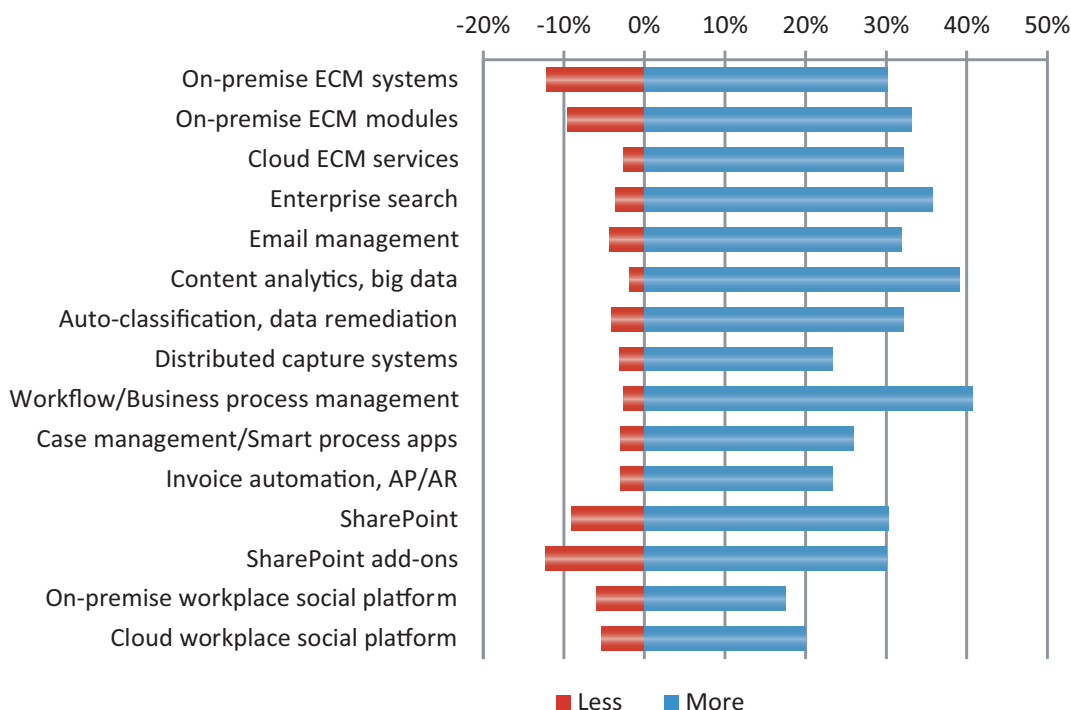
The outlook for spend on almost all ECM-related products and services is positive. BPM, analytics, search, cloud, auto-classification and email management all seem set for strong net growth.

Conclusion and Recommendations

The picture painted by our respondents is that ECM is embedded in the enterprise, is mission-critical down to an hour or less of downtime, and has much scope for expansion in many new areas of functionality. Over half still have a single enterprise-wide system as their goal, despite the number of ECM/DM/RM systems they currently support, and the rest are pushing ahead to link together other content and enterprise systems to provide a single point for search access, and where possible, in-place lifecycle management. Provision or integration of social platforms, capture systems and robust records management within the ECM suite is also an attractive option for most, and the combination of consolidation and demand for new services is driving some 15% of organizations towards system replacement plans.

User adoption is a challenge, and both the familiar file-share systems and the new cloud file-share-and-sync services have that "easy-to-use" tag that ECM deployments need to strive for – with improved remote and mobile access being a good starting point. Auto-classification and better linkage to email management would also make for an easier user experience, and would lead to improved compliance with information governance policies.

There is acceptance that cloud-deployment of ECM would improve universal access, but for most this means dedicated deployment on servers that are under their own control rather than multi-tenanted public cloud. The big cloud/small on-prem hybrid model is preferred by our users as a personal view, but their organizations' policy is more guarded, with 28% set against moving content to the cloud and the same number yet to settle on a policy.

Recommendations

- ■ Take stock of your current ECM and DM systems and consider migrating content and consolidating. Modern analytics and migration products can take much of the pain out of selecting which content to move, aligning the metadata, and removing ROT.

- ■ If your strategy is not to consolidate, then create an enterprise search capability across the multiple repositories. Then look to greater levels of connection, especially for process-related integration to line of business and ERP systems.

- ■ As your ECM/BPM/RM systems become more and more business-critical, be sure to update your system and process monitoring tools to improve visibility and pre-empt problems.

- ■ The only way to wean users from the file-share, and to discourage unofficial use of file-sync-and-share services is to improve the usability of your ECM systems. Remote and mobile access is an essential part of this, and needs to involve more than simply browser-based view-only access. Auto-classification and email integration can also help.

- ■ Evaluate how you might enhance your ECM functionality. Capture, process workflow, collaboration, extended search, workplace social, records management and e-discovery might all find a natural home within ECM.

- ■ If you do not already have one, develop an information governance (IG) framework, and use this to see where you have gaps in your ECM capability, particularly with regards to security and records management.

- ■ Bite the bullet on emails. Either use auto-classification to tag them and move them into your ECM or RM system, or implement a dedicated email archive system. Either way, they must be searchable, discoverable, and put onto a retention schedule.

- ■ 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.

■ Consider whether your current ECM systems are truly fit for purpose. If they are limited in some of the core functional areas we have discussed, or are not well matched to your specific industry requirements, or need massive customization, then consider consolidating around a new, better-suited system.

References

1. "ECM at the Crossroads- key strategy choices for universal content management." AIIM Industry Watch, June 2013. www.aiim.org/research

2. "Connecting and Optimizing SharePoint – important strategy choices." AIIM Industry Watch, Feb 2015. www.aiim.org/research

3. "Paper Wars 2014 - an update from the battlefield." AIIM Industry Watch, Nov 2014. www.aiim.org/research

Appendix 1: Survey Demographics

Survey Background

The survey was taken by 434 individual members of the AIIM community between Feb 13 2015, and Mar 06, 2015 using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 80,000 AIIM community members.

Organizational Size

Survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 34%, with mid-sized organizations of 500 to 5,000 employees at 40%. Small-to-mid sized organizations with 10 to 500 employees constitute 26%. Respondents from organizations with less than 10 employees have been eliminated from the results, taking the total to 375 respondents.
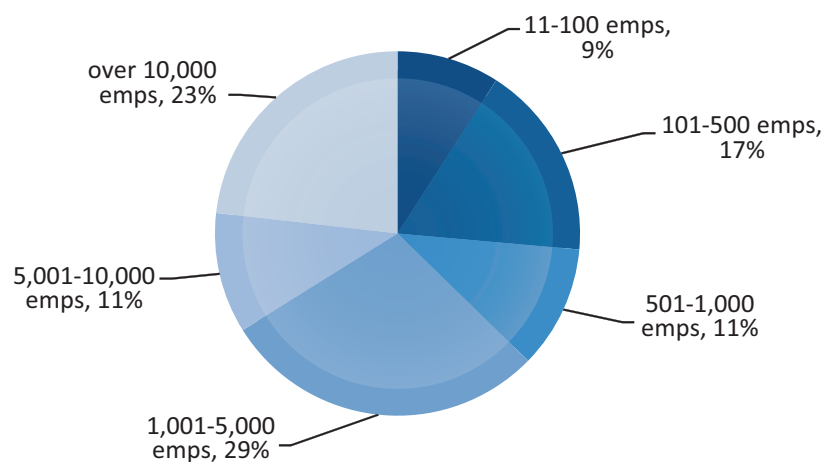
Geography

66% of the participants are based in North America, with 21% from Europe and 13% rest-of-world.
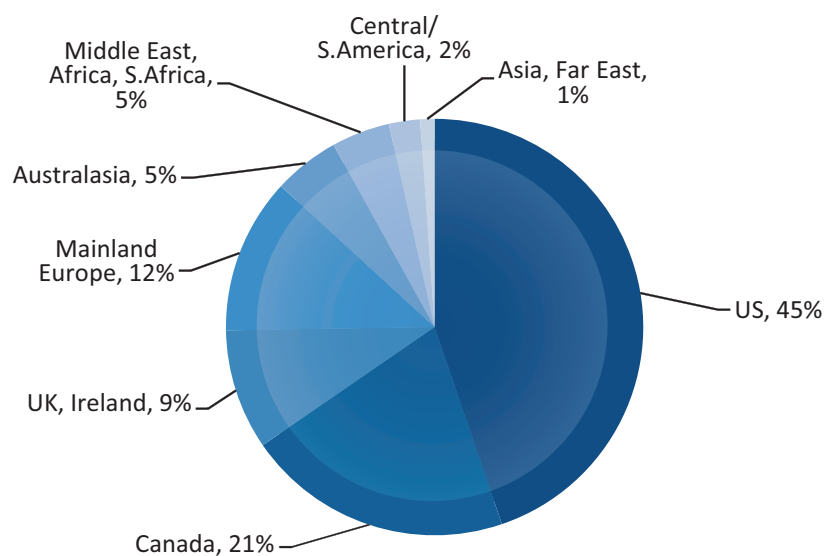
Industry Sector

Local and National Government together make up 25%, and Finance and Insurance 12%, Energy 10%. Suppliers of ECM services have been included as their responses are in alignment with other IT and High Tech. Other sectors are evenly split.
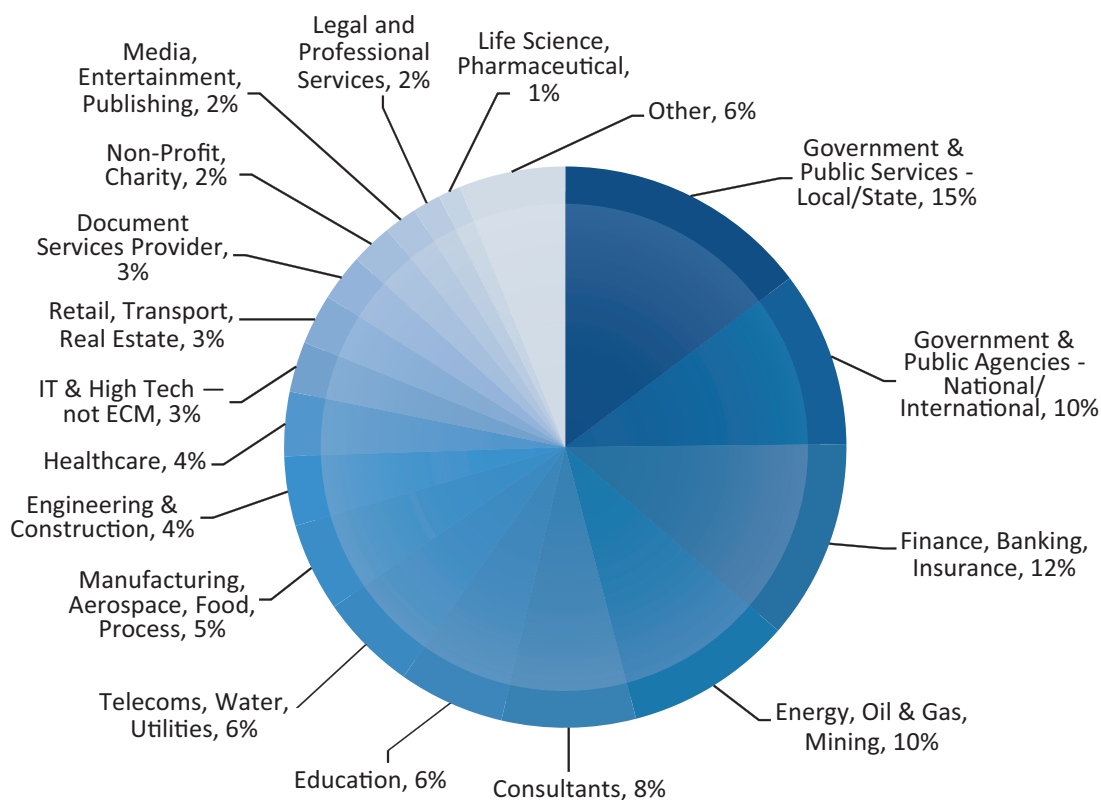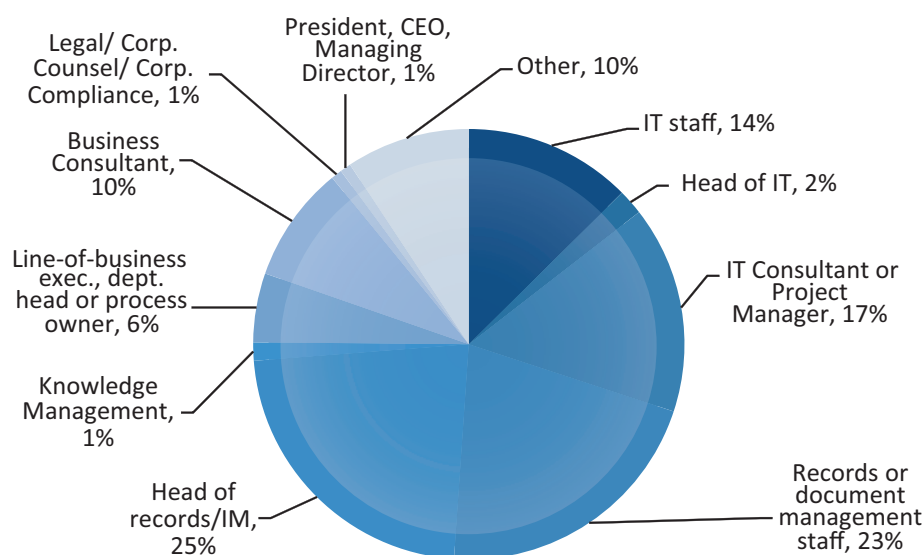

Pie chart – Industry Sector:
- Government & Public Services - Local/State, 15%
- Government & Public Agencies - National/International, 10%
- Finance, Banking, Insurance, 12%
- Energy, Oil & Gas, Mining, 10%
- Consultants, 8%
- Education, 6%
- Telecoms, Water, Utilities, 6%
- Manufacturing, Aerospace, Food, Process, 5%
- Engineering & Construction, 4%
- Healthcare, 4%
- IT & High Tech — not ECM, 3%
- Retail, Transport, Real Estate, 3%
- Document Services Provider, 3%
- Non-Profit, Charity, 2%
- Media, Entertainment, Publishing, 2%
- Legal and Professional Services, 2%
- Life Science, Pharmaceutical, 1%
- Other, 6%

Job Roles

34% of respondents are from IT, 49% have a records management, information management or KM role, and 28% are line-of-business managers or consultants.

Pie chart – Job Roles:
- President, CEO, Managing Director, 1%
- Other, 10%
- IT staff, 14%
- Head of IT, 2%
- IT Consultant or Project Manager, 17%
- Records or document management staff, 23%
- Head of records/IM, 25%
- Knowledge Management, 1%
- Line-of-business exec., dept. head or process owner, 6%
- Business Consultant, 10%
- Legal/ Corp. Counsel/ Corp. Compliance, 1%

Appendix 2: General Comments

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

- As an SMB law firm, our strategy is to try to find as many components from a single ECM vendor to minimize the need for additional IT support from multiple vendors.

- We have used ECM for 10+ years but are just now implementing a strong roadmap for moving bank-file and business processes into it.

- Historically, ECM systems had a lot of customization around functionality and when replacing these with OOTB functionality, business users struggle to let go of old technology for new functionality.

- Metadata management tools are very poor in ECM systems in general especially when it comes to multilingual systems.

- We have multiple divisions of which only 2 have adopted one of the main ECM systems and is being heavily used within some departments but not others..

- We are currently preparing an RFI to gather information from vendors on available products. Intend to incorporate one solution system-wide over a period of years, department by department based on available funding.

- Our ECM is fragmented, not likely to get better in foreseeable future. But I still dream....

- We are planning to implement an ECM solution that is as simple and easy as we can make it while still capturing documents/records for compliance

- We are looking to a more digital ECM strategy, consolidating our content into a single ECM with integration with our social collaboration platform.

- A lot depends on executive response to our soon-to-be-presented corporate ECM strategy.

- Our biggest concern is the commitment we receive from our ECM provider.

- There is no such thing as an ideal or sustainable system. We have a best fit solution in place with annual SLA renewals. This gives us flexibility to pick and choose which solution best fits our needs. This also enables us not to have all our info assets with one vendor which allows us to lower the TCO.

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The EMC Documentum product portfolio extends Microsoft SharePoint to enable familiar SharePoint interfaces for enterprise content management and critical business processes. With Documentum, organizations can scale SharePoint to reduce administrative and infrastructure costs and ensure information governance. EMC SourceOne for Microsoft SharePoint provides archiving services that optimize SharePoint for enhanced performance, reducing storage costs and transparently extending further control and governance to SharePoint content.

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Documentum is part of the EMC Enterprise Content Division (ECD). ECD provides enterprise software and cloud-based solutions that connect information to work. Its content management, intelligent capture, case management, and customer communications software and services solve the most complex information challenges organizations face today – from compliance and governance to streamlining mission-critical business processes – on premise or in the cloud. ECD also provides secure online file sync, sharing and collaboration capabilities while giving IT control and visibility into where content is shared. By connecting the right information with the right people and processes, EMC ECD solutions prime organizations to make insightful, informed decisions securely with heightened business and IT efficiency, and reduced operating expenses.

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OnBase®
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SHERPA SOFTWARE

About Sherpa Software

Sherpa Software, a leading provider of technology-driven information governance solutions, has helped more than 3,500 companies worldwide. Sherpa's award-winning software, services and support address information management, regulatory compliance, electronic discovery, PST migration/management, email archiving and more. Sherpa Altitude IG, Sherpa Software's signature information governance platform, connects to more data sources than traditional platforms, leaves your data in-place and offers robust analytics and metrics, while addressing core business issues. Sherpa Software supports Altitude IG with best-in-class customer service from a company that has been developing technology to manage electronic content for over 15 years.

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- Case Study: large financial firm (nearly 58 mil customers) reduces paper statements by 40% & annual savings >$10mil
- A Winning ECM Recipe: Simplicity On The Frontend - Sophistication On The Backend
- Document Process Outsourcing: in-house, onshore, near shore or offshore?
- ECM and the Cloud: My Documents or Our Documents?

PERSPECTIVES

Community insights, opinions, and discussions

- 14 WAYS GOING PAPERLESS TRANSFORMS ACCOUNTS PAYABLE
- AIIM Conference – Digital Transformation: Embrace the Chaos
- #RMK2015: Anwendervorträge im Fokus
- Information Governance in the Federal Sector: The Needle Just Moved

WEBINARS

On-demand webcasts led by industry experts

- Push the Delete Button with Confidence
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- Get "On the Case" for Better Business Outcomes
- Tap the Hidden Value of your Information with Better Classification and Taxonomy
- Digital Signatures Come of Age in the Enterprise: Why Aren't You On Board?
- The Best Way to Access Your Documents is Staring You in the Face – Outlook!
- My 2015 Predictions for Information Management: Who Will the Leaders Be?

TUTORIALS

How-to videos developed by industry experts

- Lessons Learned at AIIM15 - From Microfilm to Big Data: Can One Brain Handle This Much Chaos Without Exploding
- How to Use Metadata and a Taxonomy to Improve Access to Information
- How to Determine the Right Type of Taxonomy for Your Business
- How to Automate Records Disposition
- How to Safely Get Rid of Digital Landfills
- How to Best Use Box with Many Users and Documents
- How to Get Started with Case Management
- How to Establish a Folder Structure that Support Many Documents and Users
- How to Determine the Necessary Information Governance Technologies - Content, Document, and Records Management
- How to Determine the Necessary Information Governance Technologies – BPM, Search, Analytics, and Archiving

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