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About the Research

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.

The entire report is available at no cost to AIIM Professional Members.

For only **$169**, you can become an **AIIM Professional Member** and access this report plus many other valuable resources.

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About OnBase by Hyland

OnBase is a single enterprise information platform for managing content, processes and cases. OnBase has transformed thousands of organizations worldwide by empowering them to become more agile, efficient and effective.

OnBase provides enterprise content management (ECM), case management, business process management (BPM), and capture all on a single database, code base and content repository. Enterprise file sync and share (EFSS) for the OnBase platform is available with our complementary offering, ShareBase.

For more information, please visit OnBase.com.

IRON MOUNTAIN

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About Iron Mountain

With Iron Mountain Records Management services, you'll have the resources you need to effectively store and safeguard your information assets. By leveraging our proven capabilities and best practices, you'll be able to:

- Keep it safe. Employ storage processes designed to protect your critical records from a myriad of internal and external threats.
- Get it when you need it. Classify, store and track your records online, following proven best practices, so you'll be able to retrieve a particular piece of information as efficiently as possible.
- Manage with experience. Leverage the insights and expertise needed to maximize scarce resources and make records management a seamless extension of your everyday operations.

Records Storage - Leverage our network of records storage facilities to safeguard your information using advanced environmental security and access controls. Your records will be tagged and classified using your own terminology and made available on our intuitive Iron Mountain Connect™ web portal, helping you quickly locate and retrieve the information you need.

Document Imaging - Digitize your hardcopy records using our Document Conversion Services, which enable you to design a scalable imaging program that scans your records on either an upfront or as-needed basis — and makes them readily accessible across your organization.

Secure Shredding services provide onsite or offsite destruction programs that are available on an ongoing or project basis, helping you dispose of information in a compliant, reliable and cost-effective way.

Records Management Consulting - Consulting Services provide the insights you'll need to establish, manage and customize your records management program. You'll have access to expertise that helps you address the complexities of complying with the growing number of state and federal regulations governing records management.

Records Management Technology - Turn to Accutrac® Software to consistently manage the lifecycle of your records. When your records move between your office and our storage facility, they will be protected by InControl®, our patented technology that safeguards information in transit and delivers an auditable chain-of-custody.

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About OpenText

OpenText Content Suite is an integrated group of ECM solutions designed to help organizations take full advantage of the opportunities offered through Digital Transformation. By creating a centralized, unified information grid, Content Suite connects information from across the enterprise with the people and systems that need it, driving Personal Productivity with simple, intuitive tools and user experiences, Process Productivity through full integration with lead applications such as SAP and Microsoft, and Control with legendary OpenText governance and security functionality. Utilized by the largest and most innovative companies and governments in the world to enhance competitive advantage and customer relations, Content Suite is available on premise, as a subscription in our cloud, or as a managed service.

Learn more about OpenText ECM solutions. www.opentext.com/ECM

PRECISION CONTENT.com

About Precision Content Solutions Inc.

Precision Content Authoring Solutions Inc. is a full-service solution provider to medium- and large-scale organizations around the globe seeking help to better understand and solve their content challenges. Our core services involve designing and implementing innovative, scalable, and sustainable solutions for authoring, managing, and publishing high-value content.

Understanding the value of content - Content is a valuable corporate asset, driven by value, created by many authors, and generated from many sources. Yet content creation – how today's knowledge workers capture and document critical content – is often taken for granted by business organizations as something that just happens as part of the daily business routine. Your greatest advancements in information management still to be achieved may not lie in the technology you se to manage content but in the content itself.

Content Strategy - Our approach involves examining the utility, usability, and maintainability of your content with a view to developing a comprehensive content strategy for your business. Our highly-respected technical team of developers, information architects, and technology partners work to construct scalable, standards-based tool solutions.

Content Transformation - Our experienced team of technical communicators work closely with you to transform your unstructured content into highly-usable intelligent content for substantially improved future-proofing, accessibility, and multi-channel publishing capabilities. Once we are done, our trainers teach you everything you need to know to ensure a successful and sustainable hand-off.

For more information, please visit www.precisioncontent.com

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About Systemware

Systemware, Inc. has led enterprise content management for more than 35 years with our award-winning intelligent content network, Content Cloud, a hybrid offering designed for enterprises and their people. We empower digital workplaces by making them aware of their information's value. This insight comes from our solutions that effectively and efficiently capture, curate, index, store and manage billions of documents.

Some of the largest financial, insurance, healthcare and retail organizations in the world rely on our high-volume content management solutions to help them make smarter business decisions, capitalize on their valuable information, improve customer service, reduce operating costs and support compliance.

AIIM Enterprise Content Management Resource Centre

Learn how to combine content analytics, collaboration, governance and processes with anywhere, anytime access to deliver value to your customers, partners, and employees. That's what ECM -- and these best practices resources -- are all about.

PUBLICATIONS

Industry research reports, whitepapers, and toolkits

- Information Management - 2016 and Beyond
- Harness the Power of the Cloud to Amplify the Value of Enterprise Content Management
- E-Signatures in Europe: Understanding the legal requirements for proof of intent.
- A Holistic Approach to Digital Transformation

PERSPECTIVES

Community insights, opinions, and discussions

- SharePoint records management? Yes you can!
- AIIM Wisconsin at The Document Strategy Forum
- Key features to look for in your RM software's document search tool
- Toronto BPM Professionals

WEBINARS

On-demand webcasts led by industry experts

- Your Document Strategy Is About to Be Disrupted: Why is that a good thing?
- Time for Spring Cleaning: How to Clean Up Your Data
- A Holistic Approach to Digital Transformation
- e-Signatures in Europe -- Understanding the New Regulation and How It Can Help Your Business
- How Paper-Free Can Help You Find What You Need When You Need It
- The Less Paper Businesses Use, the More Problematic It Becomes: Resolving the Paper Paradox
- The Next Gen Information Professional: How to stay at the top of your game

TUTORIALS

How-to videos developed by industry experts

- How to Automate Records Disposition
- How to Safely Get Rid of Digital Landfills
- Lessons Learned at AIIM15 - From Microfilm to Big Data: Can One Brain Handle This Much Chaos Without Exploding
- Change Management: From Chaos to Transformation
- Lessons Learned at AIIM15: So You've Got Big Data...Now What?
- How to Best Use Box with Many Users and Documents
- How to Get Started with Case Management
- Lessons Learned at AIIM15 - The Future of Enterprise IT
- How to Determine the Right Type of Taxonomy for Your Business
- How to Use Metadata and a Taxonomy to Improve Access to Information

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