

Document Management, Records Management, and SharePoint trends: The implications for ECM product development platforms

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As the non-profit association dedicated to nurturing, growing and supporting the user and supplier communities of ECM (Enterprise Content Management) and Social Business Systems, AIIM is proud to provide this research at no charge. In this way the entire community can take full advantage of the education, thought-leadership and direction provided by our work. Our objective is to present the “wisdom of the crowds” based on our 193,000+-strong community.

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CAPITA

Capita Software services

Manvers House, Manvers Street
Trowbridge BA14 8YX
United Kingdom
www.capita-software.co.uk



Process used and survey demographics

The survey results quoted in this report are taken from a variety of industry reports released by AIIM, collected from individual members of the AIIM community surveyed using a web-based tool. Invitations to take the survey were sent via email to a selection of AIIM's 80,000 registered individuals.



About AIIM

AIIM has been an advocate and supporter of information professionals for nearly 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. AIIM runs training programs, which can be found at <http://www.aiim.org/Training>.



Bob Larrivee
Vice President of Market
Intelligence, AIIM

About the author

Bob Larrivee is Vice President of Market Intelligence at AIIM, and an internationally recognized subject matter expert and thought leader with over thirty years of experience in the fields of information and process management. Bob is an avid techie with a focus on process improvement, and the application of advanced technologies to enhance and automate business operations.

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AIIM

1100 Wayne Avenue, Suite 1100
Silver Spring, MD 20910
+1 301 587-8202
www.aiim.org

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Manvers House
Manvers Street
Trowbridge BA14 8YX
www.capita-software.co.uk

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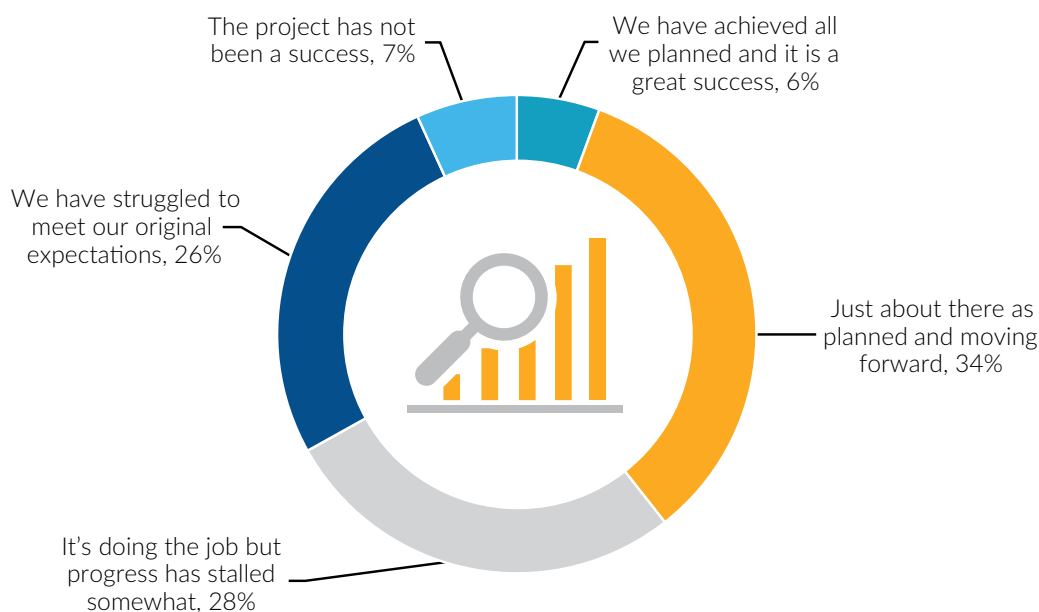
Executive Summary

Growing demand for more flexibility and faster deployment of key ECM functionality presents an opportunity for developers to build, position, and sell add-on products for not only SharePoint, but other ECM systems as well. While each have their strengths, there are gaps that could be better addressed. For example, SharePoint has been proven to be weak in the area of records management, capture, and workflow from an out-of-the-box perspective. AIIM Research finds that

- 57% of organizations use Microsoft® SharePoint® for ECM/DM, 31% consider it to be their main or only (10%) ECM/DM system.³
- The biggest on-going issues are user adoption, extending the business scope, and governance.³
- ECM is a work-in-progress for most: only 18% have completed a company-wide capability.⁴
- ECM is a multi-system landscape. 75% have more than one ECM/DM/RM systems.⁴

AIIM Research also finds that more than 50% of respondents say their ECM projects are not successful and the majority of respondents (61%) say their SharePoint deployments are stalled, struggling, or failing. Only 6% say their deployment was an unqualified success. (Figure 1) This is a clear sign of opportunity and signal that change in the way ECM is implemented and deployed must be made.

Figure 1. Thinking about the scope and development of your SharePoint ECM project, how would you describe progress?



A sound approach to addressing this is to view the process from the customer's eyes. What is their journey through your information ecosystem? What bits of content will they require, access, provide, and interact with along the way? What is their process of moving from point A to point B and finally to point C? As with any journey, there are processes to follow and tools that will make the journey and experience much more pleasant; this is where opportunity lies for the service and solution provider, to provide the tools and services required to reach the final goal in ways that are transparent to the customer.

From a technology view, these are areas for add-on enhancement. Another approach may be a vertical focus where add-on products address specific areas of business like transcript processing, invoice processing, and claims processing. In these instances, primer applications are created that cover 80% of the common functionality while the remaining 20% is addressed through configuration or customization. The thought being one of getting the organization up and running quickly and fine-tune it once it is in place. When building a strategy to address the opportunities presented, consideration must be given to:



Accessible Mobility

Access to, and interaction with any content type, anywhere, at anytime, on any device.

Optimization

- Content repositories that are optimized for maximum business results supporting capture access, and sharing

Engagement

- Ability to comment, share, edit, view, and annotate content by internal and external parties

Scalability

- Expansion from basic content management to high value solutions such as case, governance, and industry specific solutions.

Security

- Controlled access and monitoring capabilities that prevent unauthorized access with an ability to record all activities related to business content.

ECM must serve a purpose and resolve business problems in order to be successful. Simplicity, agility, and consistency are attributes sought by many businesses.



Organizational Drivers

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.

AIIM Research finds 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 still 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. This is driving user demand and supplier response for a more formalized method of integration referred to as Enterprise File Share and Sync (EFSS). Meanwhile, multi-channel inbound communications and document-centric workflows add another dimension, as they are linked to capture, case management, records management and compliance.

This leads to consumers asking questions on how to set a strategy for the future, and accommodate, consolidate or federate existing content systems. Additionally, they want to know how to align information governance policies with this varied content landscape, and in support of users and business partners for remote and mobile access to both collaborative content and the corporate knowledge base.

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.

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

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

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.

Cloud and Mobile

- **From a personal view, our respondents are largely in favour 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 favour 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.

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.



What about SharePoint?

SharePoint (SP) has been with us for nearly fourteen years now. At the outset it was an intranet platform for building websites. It allowed project teams to collaborate, make announcements, exchange documents, and share calendars. Each new release at three-year intervals added new capabilities to the platform, particularly in the areas of document and records management. Having coined the term ECM (Enterprise Content Management) in 2002, AIIM were pleased to see Microsoft use it to describe major elements of the SharePoint capability. Whether out-of-the-box SharePoint is a true ECM system remains a moot point, but it has certainly been the vehicle that took content management across the enterprise, spreading out across organizations large and small, well beyond the restricted license base of earlier systems.

User adoption has always been something of an issue for SharePoint. Despite having ready access to it, many users cling to their file-shares, or more recently, adopt other ways of collaborating and sharing documents via web-based services. AIIM Research shows that 33% of the organizations surveyed feel that their SharePoint project has struggled to meet their original expectations, and a further 26% feel progress has stalled. It is possible that this because of poor training and governance, restricted/limited functionality of SharePoint out-of-the-box, or simply the inevitable result of being the first ECM system to move beyond the safer boundaries of compliance-based operations?

For most there is a strong commitment to making SharePoint work for them as a core platform, embedded in and connected to the enterprise. Many are working more strongly within a new information governance framework, adding third-party add-on products to remediate existing data, and to fill the functionality gaps, particularly for workflow, metadata management and collaboration. Many are also looking at the Office 365 cloud options to improve access from mobile, and for collaboration with external partners. Additionally, there is a strong overall theme in training, customization and auto-classification to improve both user acceptance and on-going data quality.

Adoption Issues and Forward Strategy

- **25% are committed to building their ECM, RM and collaboration around SharePoint. For 22% it remains their ECM system of choice for the foreseeable future, and 28% will stick to it for the next few years – in total, 75% remain committed.** Only 8% are looking elsewhere right now.
- **26% of respondents report that their SharePoint project has stalled, and 37% have struggled to meet their original expectations, a total of 63% with sub-optimum installations.** 37% are moving forward, but only 11% feel their project has been a success.

Add On Products

- **15% use standard out-of-the-box SharePoint, and 39% have only limited customization.** A third use in-house or externally developed customization, and 36% use third party add-on products.
- **Workflow and BPM is the most popular add-on, followed by metadata and taxonomy management, collaboration tools, search enhancement and Outlook integration.** Migration tools and system health monitoring are also popular.

Spend

- **Many of our respondents expect to spend more on SP Online/365 licences, and on mobile deployment.** A small number expect to increase spend on training and professional services - despite the good intentions expressed regarding re-energizing projects.
- **A strong net demand is indicated across a wide range of third-party add-ons,** including site governance and monitoring, records management, BPM, digital signatures, connectivity, cleanup and auto-classify.



What about Office 365?

Office 365 presents a scenario of Microsoft addressing the needs of businesses to support flexible, accessible and device agnostic content management capabilities through a cloud based application/service. This signals a move to strongly support the iOS and Android platforms through the use of developer tools, directory services and mobile device management.

The dominance of Microsoft office productivity tools in the corporate world is causing many users of tablets, especially iPads, to consider and/or adopt Office 365 in support of their need for mobile and flexible access to stored corporate content.

While there are some gaps in the Office 365 approach from an ECM perspective – an ability to apply a structured taxonomy and controlled vocabulary - it is still unclear what exactly users are attempting

to do with Office 365 short of creating content in the cloud. This was also true of early SharePoint implementations and the impetus for the proliferation of add-on modules to fill those gaps.

Future Directions

- **For the future, 34% plan to move to SharePoint 365/Online for all (7%), most (10%), or some (17%) of their content.** Of the remainder, 15% plan to use private cloud (11% as hybrid), 14% will stay on-prem, and 36% are undecided. This represents a near doubling of cloud intentions since our last survey in 2013.

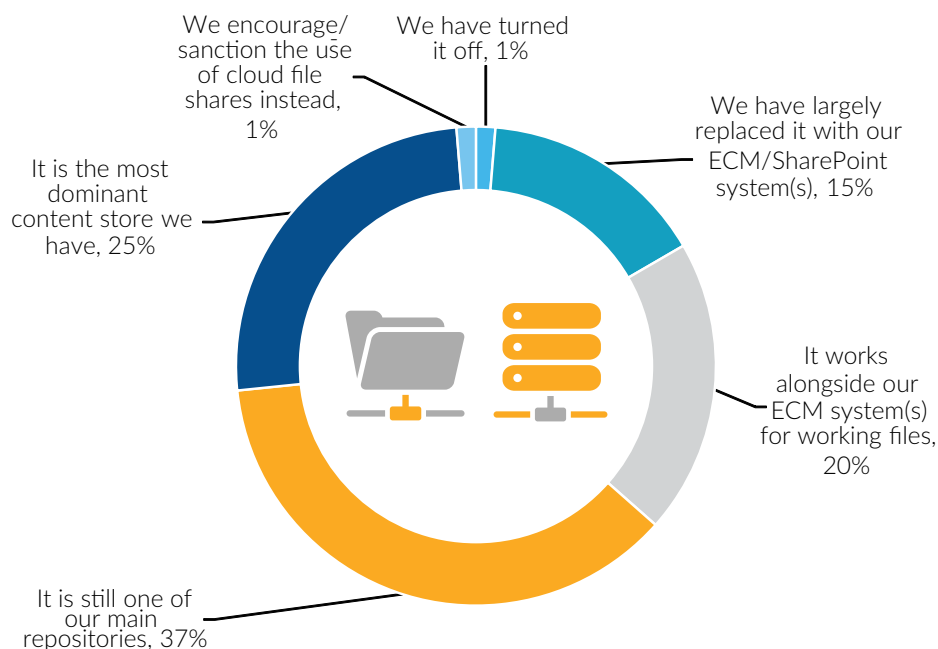


Solving Business Problems

Technology for the sake of technology will not sell well nor will it provide the anticipated results of the buyer. Technology must be positioned to address and resolve pending business problems. (It is also best to mention here that most users – when describing a business problem – are in fact describing the symptoms rather than cause.) When discussing business problems, perhaps one of slow customer response times, or limited transaction processing times, the underlying cause must be identified. For example, if the stated problem is one of transaction processing and there is a requirement for review and approval to occur, the underlying problem may in fact be that the review and approval process is a bottleneck that needs to be addressed through automation and mobile device use. Poor response time may be due to the amount of time it takes to find relevant information that may in fact be stored on shared drives rather than an integrated repository.

AIIM research finds that when asked, 62% of respondents indicate that file-share is still in heavy use if not the most dominant method for storing business content. Additionally, 20% cite they still have file-shares operating alongside their ECM solution. For 16% of respondents, an ECM system or SharePoint has replaced their file-shares with 1% saying they have turned off them off all together. (Figure 2)

Figure 2. How would you best describe the current status of your network file-share “repository” (X:Drive, G:Drive, Share drives)? ¹





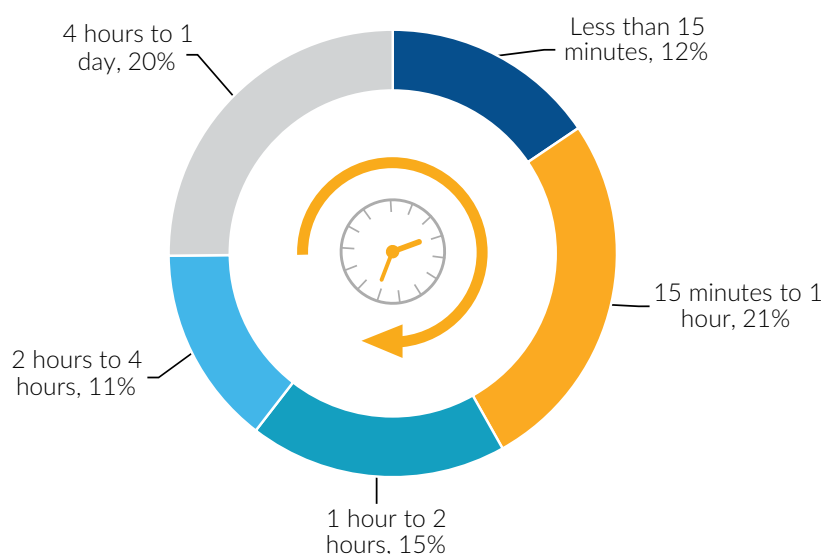
The Role of ECM and SharePoint

It is not uncommon for several content stores to be in place across an enterprise. The most common reason for this is the lack of a content strategy to start with. From a business perspective, this represents a time cost for searching, and a potential risk that vital information is missed or lost. It is also highly likely that most do not have unified access, collaboration, and mobility capabilities even if an ECM system is in place.

Yet for 67% of responding organizations, ECM/DM is cited, as being mission-critical, with 54% indicating records management in particular is mission critical. For 40% of respondents capture and workflow are seen as the mission critical element. (Figure 2) Regarding downtime, one-third of respondents indicate the impact of an outage or downtime of their ECM system would cause serious disruption after an outage of just 1 hour. 58% of respondents say they would struggle after half a day of downtime. (Figure 3)

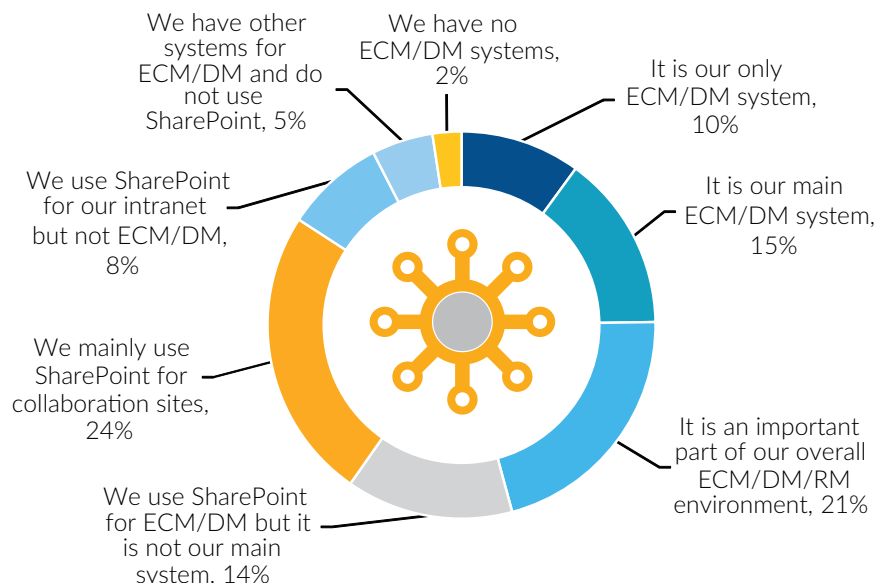
As a result, with 62% citing heavy use of file-shares and more than half citing that ECM is now mission critical for their business, the opportunity exists for savvy suppliers and service providers to fill that gap and bring business content management practices to a stronger, flexible, and more risk averse state.

Figure 3. How long before a system outage or major slowdown of your most critical content application would cause serious business disruption? ¹



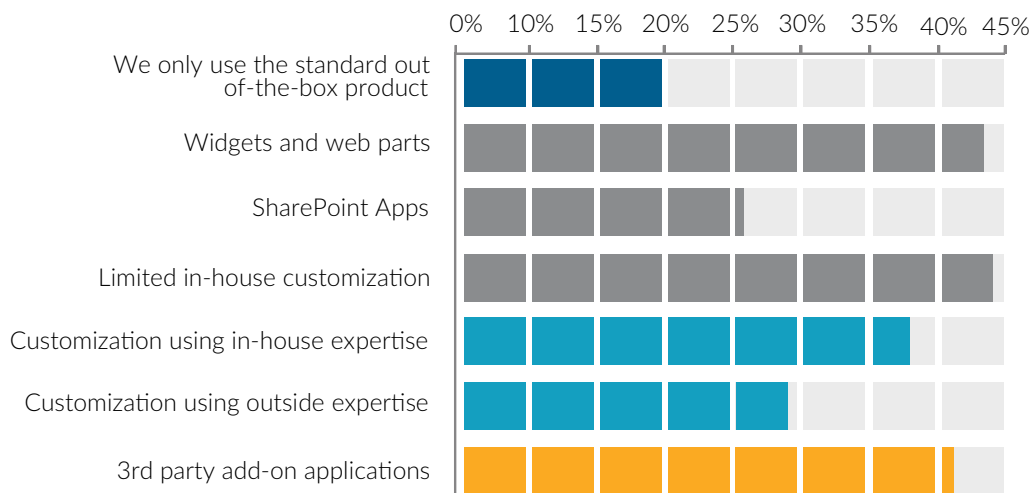
As part of an ECM strategy, businesses must look at all aspects of an ECM environment which includes people, process, governance, and technology in support of the content lifecycle spanning the capture, management, storage, preservation, distribution, and destruction of content – when applicable and within legal and regulatory guidelines. For many organizations today, there is the use of a hybrid approach combining on-premise ECM, with cloud apps, and SharePoint. AIIM research finds that for 35% of organizations, SharePoint is used in combination with an ECM or DM systems while 25% say it is either their only or main ECM/DM system. (Figure 4)

Figure 4. How would you describe the use of SharePoint as an ECM/DM system across your organization? ²



Taking into consideration the platform nature of SharePoint and the tools provided by Microsoft, only 15% of respondents indicate they use only the standard out-of-the-box product. While 39% have indicated limiting themselves to small amounts of customization, one-third have performed a significant amount of customization. In addition, 36% are using third party add-on products to fill out the required functionality. This level of customization and add-ons has created demand for services and third-party applications to significantly enhance SharePoint functionality. (Figure 5) This presents an opportunity for savvy third-party providers to leverage their expertise in ways that enhance the use of SharePoint, bridge the gaps between disparate systems and repositories, and extend the information eco-system to link business applications to valuable content assets.

Figure 5. Which of the following optimizations are you using with SharePoint? ²



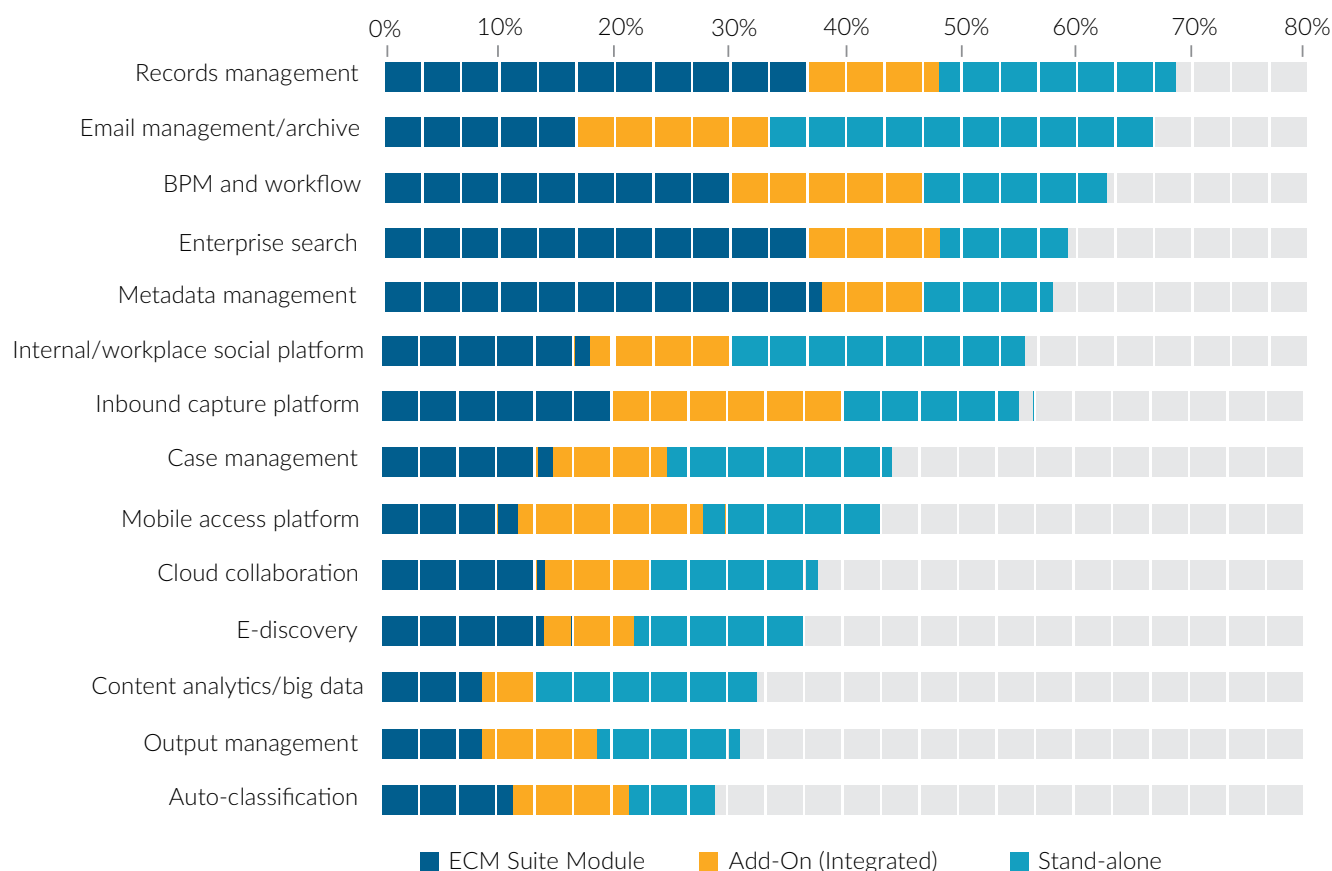


Extending ECM and SharePoint Capabilities

Once a strong ECM foundation is in place, additions can be made to expand the content ecosystem, extend the functional capabilities, and accommodate increasing requirements to address records management, mobile device use, advanced search, eDiscovery and more.

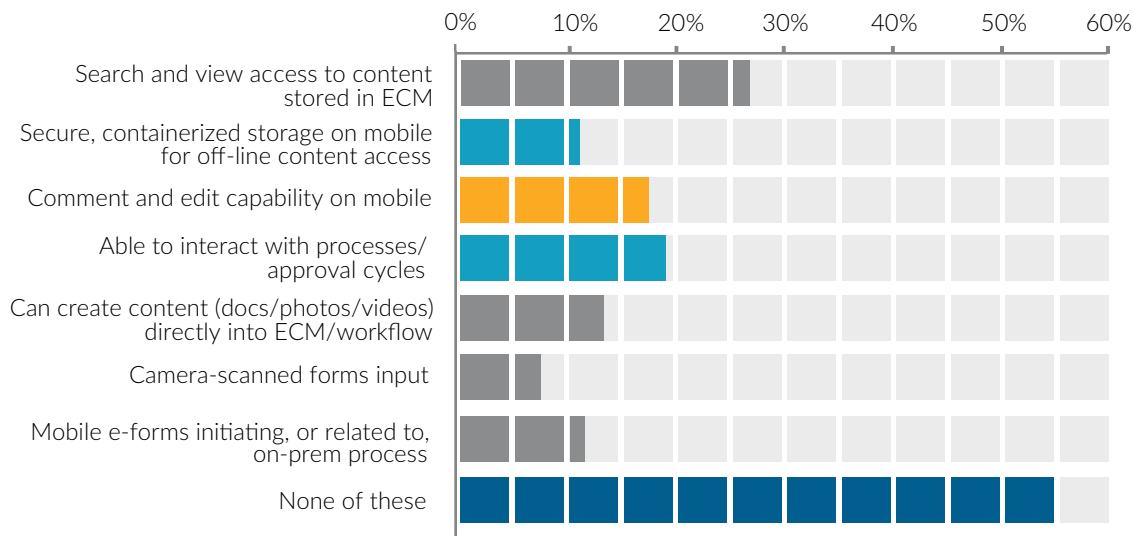
AIIM research finds that when asked about additional ECM functionalities 35% of respondents cite enterprise search, records management, BPM/workflow, and metadata management, with a further 10% using integrated add-ons for these functions (most likely with SharePoint). When asked about inbound capture, 56% indicate they are using an add-on module, a third use an integrated add-on, and a third are implementing standalone inbound capture. (Figure 6)

Figure 6. Which of the following ECM functionalities do you have deployed, and in what way? ¹



Mobility is a key focus for many organizations in support of client and partner access, interaction and engagement with remote workers. Attention in this light turns to how users interact with content on their mobile devices, and engage in collaborative work activities. Many are restricted to search and view access only, which is perhaps the result of using a browser rather than a dedicated app, and limiting offline capability. 17% of respondents support the much needed comment and edit capability using an app. Nineteen percent 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 7)

Figure 7. Which of the following app-based capabilities do you have on mobile devices? ¹



Conclusion

Indications surfacing from both the user and supplier communities are that opportunity exists for the continued development of add-on modules to enhance ECM systems, SharePoint, and Office 365 functionality. As discussed in the previous section, the focus should be on business problem resolution in the form of automation and process specific applications. These could include:

- Invoice processing
- Document control/versioning
- Correspondence management
- Collaboration and team content creation

Technology areas may include:

- Process automation
- Mobile Apps for secure access and process engagement
- Auto-classification and storage of in-process and completed content
- Simplified linkage between Office 365, SharePoint, and ECM systems

The key to success is to understand the business process, the goals or outcome of the process, barriers to accomplishing or hindering success, and identifying how ECM, SharePoint, and/or Office 365 would be applied to address the need and eliminate the barriers. As a result, apps would be developed to either fill the technology gaps or be the better alternative to what exists. For example, there are few records management add-ons to SharePoint and fewer still that meet rigorous standards requirements like those found in the United States Department of Defense requirement DoD 5015.2 which is rapidly gaining recognition on the international scene as a de facto reference for government agencies worldwide.

References

- 1 AIIM Industry Watch titled *ECM Decisions – strategic options for managing, accessing and preserving content*
- 2 AIIM Industry Watch titled *Connecting and Optimizing SharePoint – important strategy choices*
- 3 AIIM Industry Watch titled *“SharePoint 2013 – Clouding the issues”*.
- 4 AIIM Industry Watch titled *“ECM at the Crossroads”*

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Email: documentsolutions@capita.co.uk

Web: www.capita-software.co.uk/ecm

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AIIM
1100 Wayne Avenue, Suite 1100
Silver Spring, MD 20910
+1 301.587.8202
www.aiim.org

AIIM Europe
Office 1, Broomhall Business Centre,
Worcester, WR5 2NT, UK
+44 (0)1905 727600
www.aiim.eu