



WHAT UNDERPINS THE ECM NAME GAME?

The
AIIM Community
Weighs In



In Partnership with



About this eBook

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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About this Survey

While we appreciate the support of our sponsor, 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 collecting responses from 289 individual members of the AIIM community conducted between May 19th, 2017 and June 9th, 2017. Invitations to take the survey were sent via e-mail to a selection of the AIIM community members and through various social media outlets. Survey demographics can be found in Appendix 1.



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Thomas LaMonte is an AIIM Market Intelligence Analyst, well versed and credentialed in the fields of ECM, ERM, and BPM with a heightened focus on solving the operational problems of today’s businesses. Globally recognized as an industry thought leader, Thomas’ opinions and views are highly sought after by business organizations of all sizes, from both the consumer and supplier communities.

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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 a series of training programs, which can be found at <http://www.aiim.org/Training>.

Have you felt it?

Have you felt it? Gartner's bombshell decision to "retire" the term "ECM" and replace it with "Content Services" is still sending shockwaves across industry fault lines.

To close out 2016, Gartner read last rites to the collective practice of enterprise content management (ECM) and began to usher in a new era of Content Services. In Gartner's view, by 2020, "Content Services applications will replace traditional enterprise content management suites in a quarter of large enterprises."⁴

"The death of ECM is the most significant change to the information management rollcall in a decade..."

The death of ECM is the most significant change to the information management rollcall in a decade—it's an earthquake of an announcement; organizations and information professionals can't ignore the blaring emergency whistles: Is ECM dead? What is Content Services? How do we profit in this new generation of information management, and what is the relevance of the terms "content", "information", or "data" in 2017 and beyond?

Over the past few months, the search for answers has led analyst firms to draw their lines in the sand:

Gartner positioned its Content Services framework to provide a center mass for *"more integrated discussion and classification of technical solutions across all the options that exist in today's evolving content delivery environment."*

Forrester riffs on *"Content Services,"* splitting the market into two parts — 1) Transactional Content Services and 2) Business Content Services, with the former most closely aligning to "traditional" ECM.

AiIM also presented our opinion on the matter. AiIM Chief Evangelist and resident thought leader, John Mancini's latest eBook, *"The Next Wave: Moving from ECM to Intelligent Information Management (IIM)"* finds both the terms—Content Services and ECM—unfit to encapsulate the "morphed"

information landscape, and lays out a roadmap for the next generation of information management. Familiar stops on the journey include many nuanced flavors of intelligent information management solutions, a heightened focus on intelligent metadata, making the most of legacy investments, and a holistic transformation effort from the top-down (C-level) and bottom-up (content and records practitioners).

"What does the death of ECM and rise of whatever-comes-next mean for people working with content today?"

Adding to the discussion, countless blogs have sounded off on the ECM obituary, providing a keen sense of how analysts and the supplier community understand the disruption next generation information management has caused. But what about information professionals—actual users? What do end users plan to call it? Is it still ECM? Is it Content Services? Is it IIM? What does the death of ECM and rise of whatever-comes-next mean in the context of people working with content today?

Polling 289 members of the AiIM community, we mined opinions to find out how end users understand, sense, and define next generation information management. How does this new information management paradigm fit with existing information management systems, information governance policies, current capabilities, and future plans?

In this eBook we set out to demystify the next generation of information management and outline a community definition that speaks in practical business terms that are most relevant to end users.

Core to this definition we must answer several important questions:

- What is Content in 2017?
- Is ECM still relevant?
- What does next generation information management mean for my organization?
- What information management capabilities are essential?
- And what are the next steps?

The Centralized ECM Platform is a Dream –Time to Wake Up

Before we can begin to address our research findings and define next generation ECM, we must assess where we've come and where we are going. Over the past decade, the dream state of enterprise content management has long been a centralized platform to manage all information in the enterprise. This goal has proven to be shortsighted with many challenges. John Mancini had this to say:

*"We've tended to assume in the world of "ECM" that you need to buy a full suite of content capabilities as a platform, even if you only needed some portion of those capabilities in a particular process. It seems like "ECM" has become a combination of layer after layer of new features and capabilities tied to the most complex challenges—regardless of whether all of these capabilities are actually needed to solve a particular business problem."*³

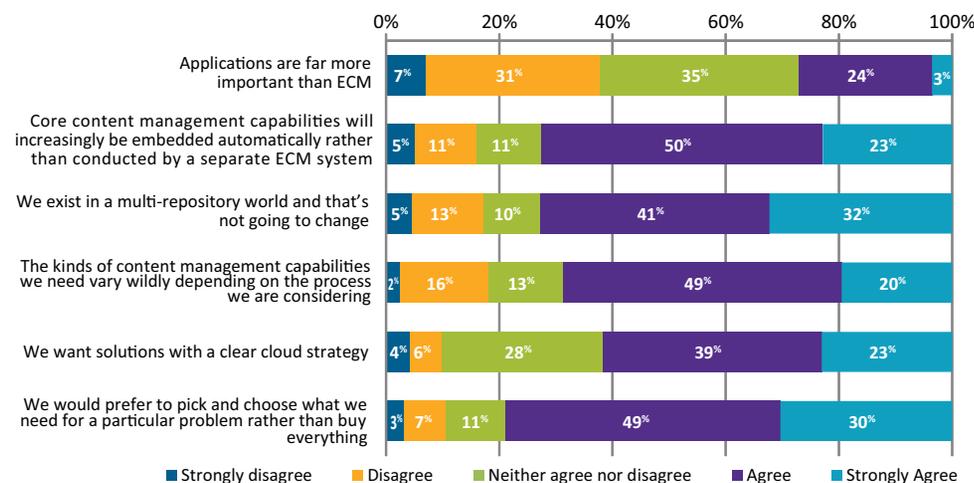
This all or nothing approach to content management has left gaps in meeting all of the organization's information management needs. Presently, twenty-two percent of the AIIM community considers their ECM project to be stalled, and often, businesses are littered with data silos. (Fifty-percent of those polled have three or more ECM/DM/RM systems, and 22% have five or more).²

"[Next Gen Info Mgmt] is about the ability to disaggregate content capabilities... to consume content management by the drink rather than the gallon"

Next generation information management, including Content Services, refers to the movement away from a monolithic view of ECM and the need for users to buy everything in order to get some subset of content capabilities. In John's words, "it is all about the ability to disaggregate content capabilities and for users to be able to buy and consume content management capabilities by the drink rather than by the gallon."³

We see this tilt in the market playing out among the end user community and changing how people think and talk about information management. Recent AIIM research finds that 73% agree to strongly agree that there is no denying it: we live in a multi-repository world, and by extension, the indication is that information management strategies need to shift to keep pace with the new reality. This inference is supported by 73% of organizations who agree that the future is embedded, core content management capabilities, as well as the 56% who report that they are primarily driven to information management solutions by the need for heightened integration. (Figure 1)

Figure 1: To what extent do you agree or disagree with the following statements?¹



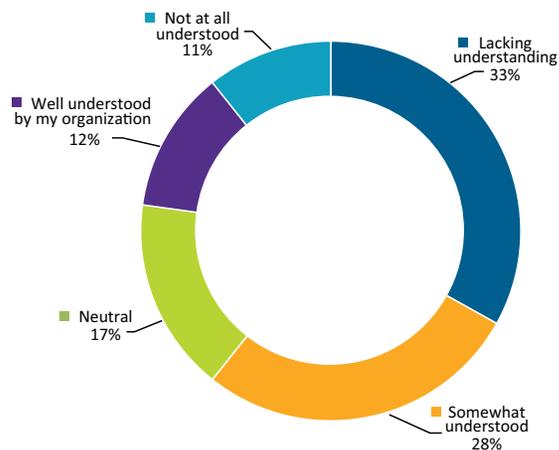
There is also strong desire for a straightforward cloud strategy, a common refrain for 62% who want a simple, understandable SaaS roadmap. Thirty-eight percent believe that discrete content management applications should not supersede a higher level ECM strategy. Judging from these results, though end users appear eager to adopt emerging technology, will their values and priorities remain firmly rooted in the traditional ECM certainties? We will see—now onto the research.

ECM – The Latest Internet Death Hoax?

Is it time to lay ECM to rest, or is it still kicking? This was the first order of questions we asked the AIIM community to help determine the future of next generation information management. To begin, we wanted to know how identifiable the concept and term ECM is at the organizational level—roughly, how many people would show up to ECM’s funeral.

We asked respondents to rate how well ECM is understood by their respective organizations. Thirty-three percent of poll takers reported a lack of understanding, and 11% said there was no understanding of ECM at all. Forty percent describe ECM as being somewhat to well understood by their organization as a whole. (Figure 2)

Figure 2: How well is the term “ECM” understood by your organization?¹

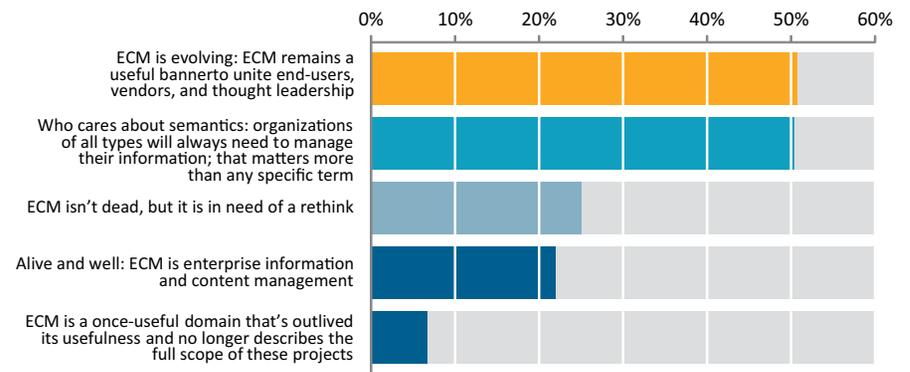


Is even the stalwart ECM label losing relevance, or perhaps, ECM never had the recognition and community mandate some have claimed? At first glance, this seems to be a logical conclusion: how can less than half vouch for ECM at the organizational level, and yet a group just as large confess to having limited or no understanding of ECM at all. The truth is that ECM is not some tightly woven fabric that holds this industry together immutably, its threads are yanked and stretched, fit-to-order, and is thought of in a much looser or stricter sense depending on who you talk with. For some, ECM bleeds into a backdrop of IT, in other pockets of the industry ECM is a stranger, and Document Management (DM) is the preferred term. But the most likely case for the majority of organizations

is that ECM is a niche concern; it matters to records managers, but the rest of the organization is on a steep learning curve. When we asked respondents to sum up their personal feelings about the fluctuating relevance of ECM, 19% personally view ECM as the industry flag bearer, and 18% personally feel ECM’s star is falling.

So, as a term, is ECM dead?—probably not, but it may be slinking into antiquity, no longer enjoying the celebrity status in information management circles it once demanded.

Figure 3: Is ECM “dead?”¹



Our next question asked our respondents point blank: Is ECM, as a term, concept, and icon of the information management space now defunct? What we found is that 51% believe ECM isn’t dying, but evolving, adapting to new burgeoning technologies and strategies (e.g., intelligent metadata, cloud services, and blockchain). In addition, half believe that ECM is—although not the industry flag—a useful banner to unite end users, vendors, and thought leadership. In this sense, much in the same way one would prefer to maintain their same cell phone number when upgrading to a new model, there is a power in familiarity and a practical motivation to maintain the term ECM—despite disputes over its relevance, a sizable amount of people know ECM’s “phone number” already. (Figure 3)

Pragmatically, half of the respondents added their support for the following opinion: “who cares about semantics; organizations of all types will always need to manage their information; that matters more than any specific term.” In essence, stop wasting time over what it’s called, and get on with the job of managing information.

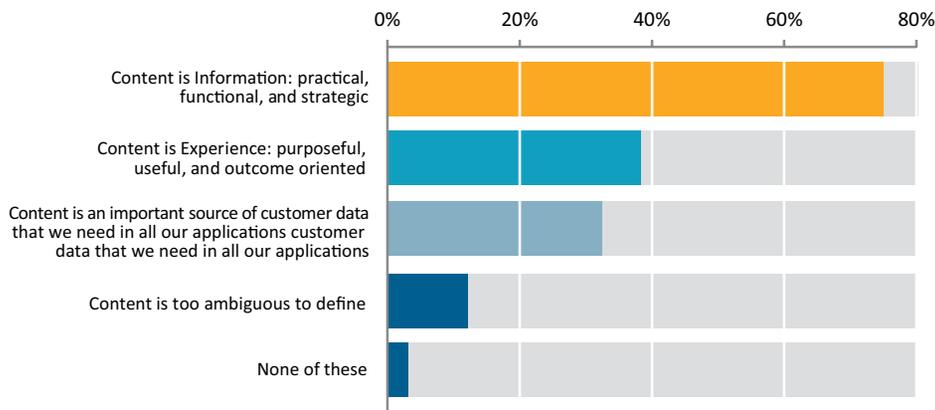
On the outer rim of the curve, 22% lend their full support of the ECM brand and agree that ECM is alive and well, while 25% are also sceptical of ECM's death, but believe that ECM is in need of a rethink. Finally, 7% add weight to the view that ECM is a once-useful domain that's outlived its usefulness and no longer describes the full scope of these projects. The takeaway is a split community, unready to pay our respects to ECM just yet, but unsure of what kind of future ECM has, or should have, moving forward.

What is Content in 2017?

In order to define next generation information management and what Gartner calls Content Services, we must first determine what content is—or isn't.

We asked the community: how do you define content? Seventy-five percent of respondents said that content is information: practical, functional, and strategic. Content is experience: purposeful, useful, and outcome oriented for 38%, and content is an important source of customer data for 32%. To avoid the temptation to choose all of the above, we limited respondents to a single choice. (Figure 4)

Figure 4: How do you define content?¹

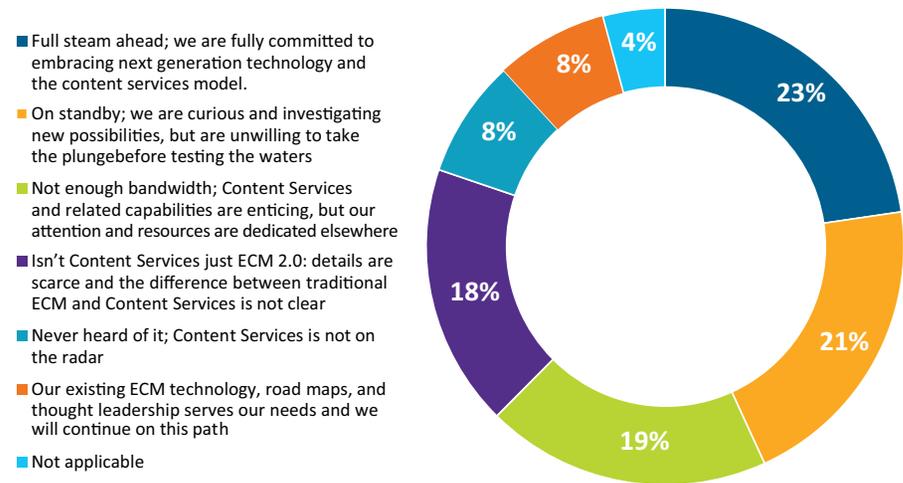


For the majority, content is information, and tightly intertwined with business strategy. Today, more than ever, content and information assets are treated like currency, a valuable enterprise resource that requires strategic investment, management, and application. Applying this definition of content to ECM, whether or not ECM is living or dead has everything to do with whether or not the solutions under an ECM umbrella are deemed effective and in line with our strategies. Time and time again, strategy is king for end user decision makers. When we link content to strategic information, this may suggest

that the way we think about content has changed - from a perspective of unchangeable records or captured files, to something defined by its value as applied to content driven enterprise processes and digital business; is strategy the industry zeitgeist of the day?

Moreover, the question also tears open doubts about the relationship of information and data. As analytic solutions become more available and the blockchain upheavals go head-to-head with traditional enterprise, there is a need for strategies to separate and cleanly divide the boundaries for what constitutes unstructured content with data. While this requires further investigation, expect to see clarification of the relationship of content vs. data as critical to next generation information management solutions and strategies.

Figure 5: How would you best describe your organization's early experience with Content Services, or steps you have taken to investigate next generation ECM?¹



Gartner struck first with their Content Services framework, so it is important to benchmark organizations initial reactions and decisions. When we asked respondents to relay their early experiences with Content Services, we found that 23% of organizations say they are full speed ahead with the Content Services model. Many of these early adopters are in step with Gartner's brand of next generation information management, and others may be hoping to gain an advantage by being out ahead with Content Services, providing that, in the end, the chips fall in favor of Content Services.

Of course, this is a gamble, as 66% of respondents say they are holding back from Content Services and next generation information management for the

time being. Twenty-one percent describe being on standby or curious, but testing product and strategy possibilities before taking the plunge. Nineteen percent are intrigued by the Content Services framework, but don't have the bandwidth—lacking both attention and resources. Eighteen-percent express trouble differentiating between Content Services and traditional ECM, and complain that further information is scarce. Eight percent have no awareness of what Content Services is. (Figure 5)

Notably, a lot of this apprehension will change when suppliers join the fray with Content Services oriented solutions and products to help sell the story. In addition, 39% of respondents predict that Content Services will prove somewhat to extremely useful in explaining content management issues. So while the initial market reaction seems lethargic, it's quite possible that when suppliers and associations begin to connect messaging to real business terms, as well as make appeals to the bottom line, this weariness will be lifted.

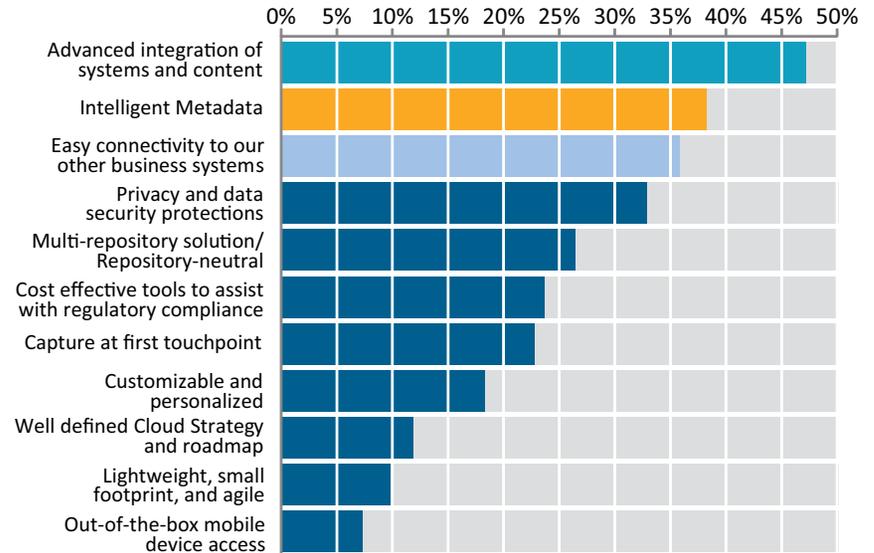
What Capabilities Do Organizations Need?

Another key component to defining the next generation of information management are the features and capabilities end users feel are most critical for the future product line of information management technologies and solutions. Here are the results for top functional requirements for a content management system:

- 47% - Advanced integration of systems
- 38% - Intelligent metadata
- 36% - Easy connectivity to our other business systems
- 33% - Privacy and data security protection
- 24% - Cost effective tools to assist with regulatory compliance. (Figure 6)

In a separate question, we asked how important it is to have simple, secure, and scalable enterprise applications which mirror the usability of technology in your personal life, and 47% of respondents answered extremely important.

Figure 6: Which of the following describe your top functional requirements for a content management solution? (MAX Three)¹



What Does the Future Hold?

We've outlined some of the seismic changes going on around the industry, debated the mortality of ECM, defined content according to the AIIM community, and looked over key capabilities shaping the future, but where are organizations and end users going next?

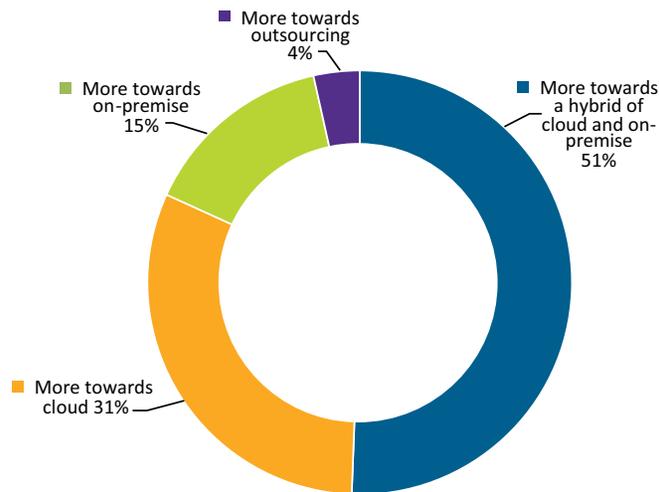
When we asked organizations to best describe their ECM/DM/RM strategy going forward, this is what we found:

- 21% will continue to build a best-of-breed multi-vendor solution.
- 16% have no strategy.
- 14% will keep with investing in their current enterprise-wide-single vendor suite.

Next, we asked our poll takers how they viewed their delivery/deployment methods for content management in the next two years, and we learned that 31% of respondents plan to do more with cloud, and more than half will move towards a hybrid of cloud and on premise. (Figure 7)

How does your organization measure up to these results? Is this surprising or expected? What is your organization's next move, and do you agree?

Figure 7: How do you view your delivery/deployment methods for content management within the next two years?¹



Closing Thoughts

To summarize, let's go over some of the key points that have risen to the top as integral factors to defining next generation information management:

- 1) We live in a multi-repository world.
- 2) Integrated systems, and in equal parts simple, committed cloud strategy, is critical.
- 3) ECM isn't dead, but it is evolving.
- 4) Semantics aside, the focus needs to be on the task at hand: managing information to overcome information chaos.
- 5) Content is strategic and useful to drive business processes.
- 6) Advanced integration and intelligent metadata are top functions shaping the future, along with cost effective tools to mitigate data security and regulatory compliance risk.
- 7) Content management solutions will be delivered increasingly from the cloud—we need to be prepared.

As expected, our survey revealed different perspectives and varying degrees of maturity within the AIIM community, yet most agree that the ECM business model is evolving from monolithic, proprietary software stacks to more agile services composed of content management components that are easy to deploy – on the cloud or on premises - and simple to license.

While that's enough for the analysts to try to replace ECM with another moniker, let's not forget that ECM is also a set of best practices – learned over a generation – about how to capture, activate, analyse and govern the most important source of knowledge in the organization.

Once exclusively the realm of records managers and mailroom clerks, content has steadily insinuated itself into all departments and every aspect of the business. Today, with easy cloud-based repositories and handy mobile capture and case management applications, anyone in the organization can become a content worker. This democratization of content demands a recognition of the strategic value of content to an organization.

Call the industry what you wish – and with no clear winner so far, the name game looks like it will continue – but there is a clear recognition that internally, content is the ongoing conversation between subject matter experts, essential to the growth and efficiency of the organization, and externally, content coming from partners and customers is where the clues are hidden to understanding customer sentiment.

If nothing else, ECM taught the world that it's the strategy, not the products, that underpin a successful content program. For this reason, "ECM" remains a useful term to describe the practice of treating content as information, of guarding and protecting it through a certified chain of custody, and putting it to work on behalf of the organization. In this way, ECM lives on!

References

- ¹ AIIM Custom Research Survey titled - *"The AIIM Community Defines Content Services"*
- ² AIIM Industry Watch titled *"Information Management – State of the Industry in 2016"*
- ³ AIIM Digital Landfill *"6 Personal Observations about "ECM" and "Content Services" author John Mancini*
- ⁴ Gartner Blog Network *"Questions and answers about Content Services – an Obituary"*

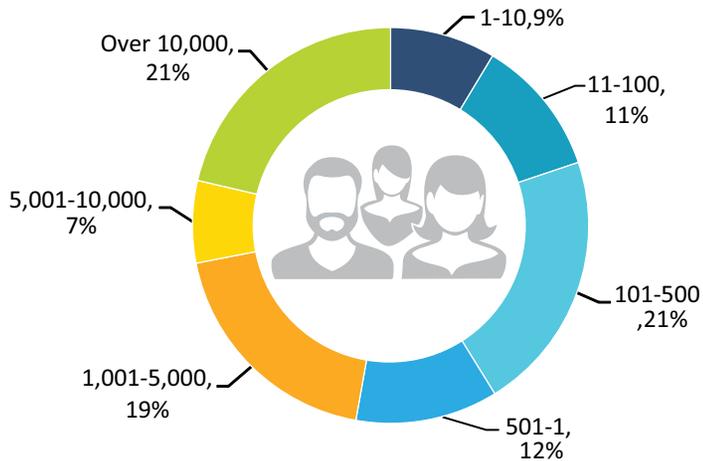
Appendix 1: Survey Demographics

Survey Background

The survey was taken with a web-based tool collecting responses from 289 individual members of the AIIM community conducted between May 19th, 2017 and June 9th, 2017. Invitations to take the survey were sent via e-mail to a selection of the 193,000+ AIIM community members and through various social media outlets.

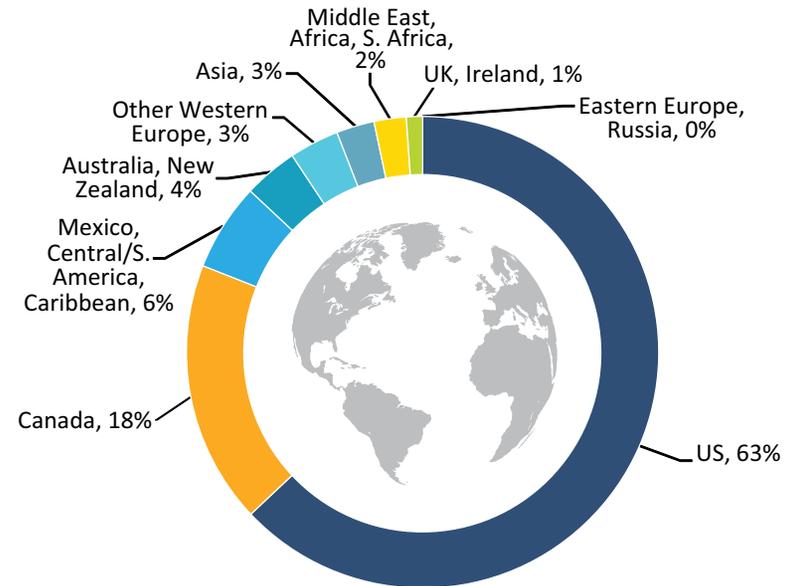
Organizational Size

AIIM survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 28%, with mid-sized organizations of 501 to 5,000 employees at 1%. Small-to-mid sized organizations with 1 to 500 employees representing the largest segment of survey takers at 41%.



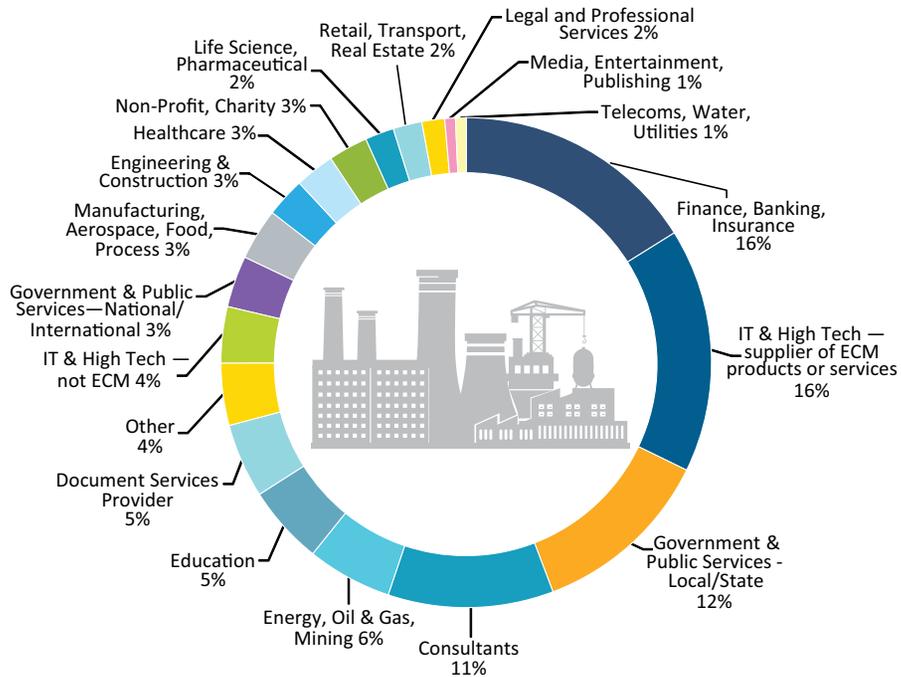
Geography

Eighty-seven percent of the participants are based in North America, with 6% from EMEA-R, and 7% rest-of-world.



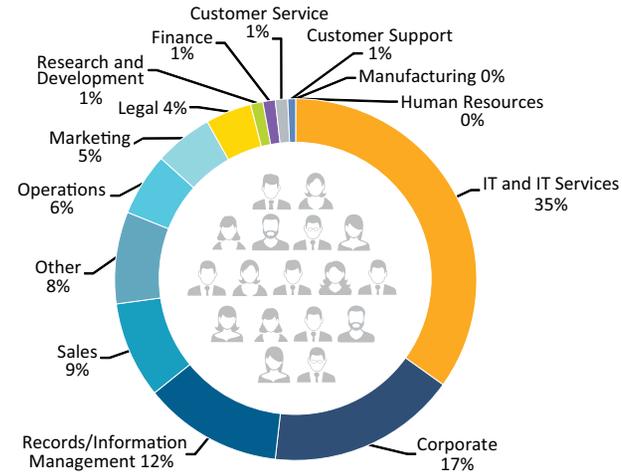
Industry Sector

IT and High Tech – supplier of ECM make up 16%, and Finance, Banking, and Insurance 16%, Government & Public Services – Local/State 12%.



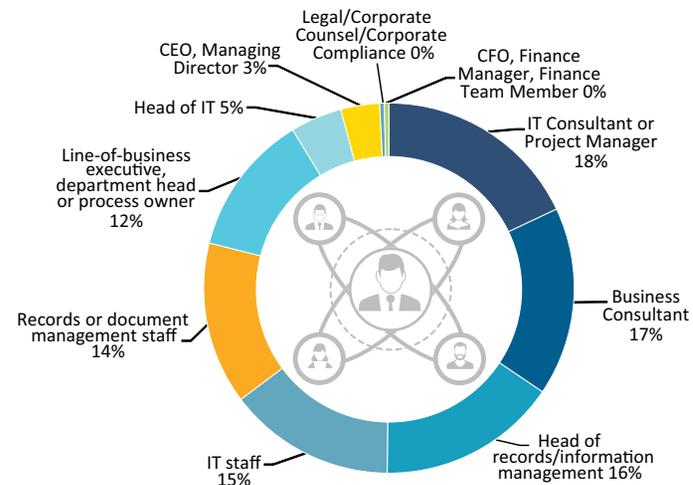
Departments

35% of departments represented are from IT/IT Services, 17% corporate, and 12% records and information management.



Job Roles

18% are IT Consultants/Project Managers, 17% business consultants, 16% heads of records and information management, 15% IT Staff, and 3% CEO or C-series executive.



Appendix 2: General Comments

Respondents were able to provide open-ended comments about digital transformation. Here are a select few that represent the general:

- We see content services as a part of our core business, but we are still working on the strategy to deploy it.
- All of this is wrapped in a simple, unified user experience that people will adopt.
- It's here and in use already - not next generation
- I agree with the desire to rebrand away from a seemingly dated term, but "content services" feels too understated.
- Very few organizations that are large enough to implement an 'enterprise' solution are also young enough to do so with a blank slate. Until there are standards and common practices, the industry will remain fragmented and will not be in the position to truly define itself because the market will push for specialization before standardization... "Fix MY problem first"
- I strongly support retaining the ECM nomenclature - the term "next general ECM" is acceptable; dropping ECM for content services is an unnecessary exercise and a distraction - focus on terms and semantics people already understand and use



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IBM has one of the industry's broadest portfolios of ECM software, which is used by large multinational enterprises for transactional content management, knowledge management and a variety of business content services. While especially strong in the financial services, insurance, telecom and government sectors, IBM ECM solutions are seeing growing adoption in retail, healthcare and distribution, to name a few. Consistently rated the leader in ECM by Gartner, Forrester, and IDC, IBM ECM solutions offer robust and scalable tools for intelligent capture, document management, report management and records management with a reputation for strong governance, risk and compliance capabilities. Work management capabilities include advanced workflow, dynamic case management, enterprise file sync and share, eDiscovery and advanced search. As organizations build up their Digital Business capabilities, content volume increases and grows more diverse, with voice, video and IoT data. Today, leading IBM clients are turning to analytics and artificial intelligence integrated with content for a deeper understanding of people and processes and for new solutions in fraud prevention. Many are also expanding their content solutions to engage more users with cloud and mobile capabilities. Business content connects customers and companies, employees and partners, and every department within an enterprise. IBM clients and business partners are building a new generation of solutions to engage across all stakeholders for better customer experiences, improved productivity and better business outcomes.

For more information, visit

www.ibm.com/analytics/us/en/technology/enterprise-contentmanagement/

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About AIIM



AIIM (www.aiim.org) is the global community of information professionals. We provide the education, research and certification that information professionals need to manage and share information assets in an era of mobile, social, cloud and big data.

Founded in 1943, 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, with programs and content for practitioners, technology suppliers, integrators and consultants.

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