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Delivering the priorities and opinions of AIIM's 193,000 community

WHAT WE LEARNED FROM THE AIIM COMMUNITY IN 2016

and

What We See In 2017

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ABOUT AIIM MARKET RESEARCH

As the non-profit association dedicated to nurturing, growing and supporting the information management community, AIIM Market Intelligence is proud to conduct research studies and provide the results to its professional members 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 2017, www.aiim.org"

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About this eBook

This paper is a combination of aggregate survey results from the AIIM Industry Watch series conducted throughout 2016, and views and opinions about future trends and directions based on these findings combined with insight gained through AIIM's interactions with the supplier and consumer communities.

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.

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INTRODUCTION

Changes In 2016

Introduction

2016 brought about some interesting changes in the information management industry. Among the big changes in the supplier landscape, we saw Dell acquire EMC who then sold its Documentum solutions to OpenText, further consolidating what may be considered legacy players. We also saw an increase in activity from suppliers like M-Files, ASG, Lexmark, and Konica Minolta, as well as those some may call boutique solutions like Precision Content, adenin, and Bottomline Technologies.

Along with watching these types of activities, AIIM Research for 2016 focused specifically on the areas of ECM, BPM, SharePoint, Paper Free environments, and Content Analytics. The following is a recap highlighting our findings from the 2016 Industry Watch reports, some conclusions we have drawn based on the responses collected from the AIIM community, and what we see ahead for 2017.

State of the Industry:

As ECM becomes a mature technology, many organizations are stepping back and reviewing their information lifecycle practices as a whole, from authoring to destruction. While some may be replacing and updating their ECM and ERM systems, others are seeking to automate their processes – including authoring, capture, enhancing the user experience through cloud and mobile and finding ways to strengthen their information ecosystem through better integration with their ERP, CRM, and other line-of-business (LOB) applications.

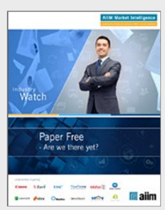
Process Automation and BPM:

It has become quite clear to many business leaders that information and process are an integrated component of business operations as a whole. When something is changed in the way information is managed, it inherently impacts the associated business processes and the way people work and interact with that information. Likewise, when process is changed, it will impact worker interactions with information and with each other.

SharePoint 2016:

SharePoint 2016: The SharePoint platform has evolved over time, positioning to become a universal interface of sorts, for collaborative efforts, information sharing, and integration with all enterprise information sources. For some organizations each new version of SharePoint is welcomed and embraced, but for others, it is a struggle to keep up. Surprisingly, as SharePoint 2016 is being introduced, there are organizations that are just now moving to SharePoint 2013 and some only to SharePoint 2010.

Paper-free:



World Paper-Free Day 2016 has become a focal point and opportunity for many organizations to introduce the concept of paper-free or less intensive paper processes to their organizations. Here, we take a look at what organizations are doing to minimize and eliminate paper as well as steps they plan to take in moving towards paper-free processes.

Analytics:

Beyond "big data" style business intelligence, content analytics is driving auto-classification, content remediation, security correction, adaptive case management, and process monitoring and modelling. The first step for many analytic processes is capture and recognition – from paper, and from other inbound channels. In this report we will look at the take-up of analytics applications, the success factors and outcomes, integration across repositories and best of breed versus suite.

Information management must look at the business, organization, and operations with a holistic view. People, process, technology, and information need to be addressed in a concerted not a siloed approach. The following pages will highlight AIIM's findings in each of the areas above, and conclude with how we see the world of information management moving into 2016.

If you would like the full versions of any of the reports cited here, we encourage you to visit the AIIM website at www.aiim.org/research and request a copy for download.

INFORMATION MANAGEMENT:

State Of The Industry 2016

Information Management: State of the Industry 2016

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 polices, and there is near universal agreement that email is still the big untagged, ungoverned, high-risk content type.

In this report we looked 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

7. ***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.

8. ***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.

9. ***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.

10. ***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.

11. ***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.

12. ***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

13. ***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.

14. ***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%.

15. ***8% consider SharePoint to be a "legacy" system, compared to between 7% and 15% of those systems traditionally described as legacy.***

16. ***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.

17. ***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%.

18. ***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.

19. ***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

20. ***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.

21. ***26% of organizations are using multiple, point-solution capture systems (rising to 34% of the largest).*** 15% have distributed capture and 13% digital mailrooms.

22. ***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

23. ***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.

24. ***In 47% of organizations a content system outage of more than 2 hours would cause serious business disruption.*** 79% would struggle after one day.

25. ***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

26. ***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.

27. ***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.

28. ***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

29. ***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.

30. ***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.

31. ***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.

32. ***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.

PROCESS IMPROVEMENT AND AUTOMATION 2016

- A Look At BPM

Process Improvement and Automation 2016 – A look at BPM

Many organizations recognize the need to improve their business processes and the benefits that result from process automation. Similar to the rise in the dependence upon and criticality of Enterprise Content Management (ECM) systems shown in the 2016 AIIM Industry Watch Report titled "Information Management – State of the Industry 2016", fifty-five percent of respondents to this survey say Business Process Management (BPM) is significant (38%) or imperative (17%) for their business.

Research shows that it is quite clear that many business leaders understand now more than ever before, that information and process form an integrated component of business operations as a whole. There is a growing realization that when something is changed in the way information is managed, it inherently impacts the associated business processes and the way people work and interact with that information. Likewise, when process is changed, it will impact worker interactions with each other and with business information. The simple truth is that content without process goes nowhere and process without content serves no purpose.

Given this growing sense of importance and need for BPM, attention turns to how well BPM is truly understood by the users and business leaders, how amenable organizations are to change their ways-of-working, and the focus they have on solving business problems through process improvement and automation. There is also a commitment that should be made to continuously improve business processes as an on-going effort, rather than approach it as a singular project. On-going improvement should be an embedded part of the business culture with periodic assessments to identify additional areas for improvement and automation as a follow-up to project completion.

In this comprehensive report, we looked at the perceptions of BPM, business drivers, technology infrastructure, benefits, technical requirements, and purchase and spend plans of responding organizations. Each section presents our findings along with the analyst's views. The report concludes with a summation and recommendations organizations can apply to their business, based on the survey findings.

Key Findings:

Perceptions of BPM

1. ***The majority of respondents see BPM as the combination of a systematic approach to improving business processes (97%) and workflow or BPM technology (79%).*** 66% see BPM as change management.
2. ***Forty-eight percent of respondents say they are vaguely familiar or no clear understanding of BPM.*** 18% say it is well understood and embraced in their organizations.
3. ***Nearly one-third of respondents say there is no one directly responsible for ownership of their processes.*** 58% say they have process owners.
4. ***Fifty-five percent of respondents say BPM is significant (38%) or imperative (17%) for their business.*** For 14% there is little to no importance placed on BPM.

Business Drivers

5. ***Stuck-in-process is the biggest operational problem for 58% of respondents.*** For 46% it has to deal with compliance errors.
6. ***According to 32% of respondents, BPM projects are driven departmentally.*** For 31% BPM project are driven from the top down.

7. ***Outsourcing of payroll and benefits is routine for 35% of respondents.*** Outbound mail and print are routinely outsourced for 30%.

8. ***Process governance policies are in place for 48% with 14% of those respondents indicating they are enterprise-wide.*** For 18%, there are no process related policies at all.

Technology Infrastructure

9. ***Large mailroom scanners are in place, supporting digital mailrooms for 21% of respondents.*** For 31% of respondents, a distributed capture process is in use.

10. ***Cloud services and mobile device use are key functionalities in use by 40% of respondents.*** ECM/ERP data management integration is in place for 46% of organizations.

11. ***Process modelling (66%) and Business Activity Monitoring or BAM (53%) are being used by respondents' organizations.*** While Application Programming Interfaces (API) and Software Development Kits (SDK) are in use by 47% of responding organizations.

Benefits

12. ***One-third of organizations have seen a decrease in their review and approval cycles and 62% say they have gained benefits from better routing to and between individuals.*** For 42%, the benefits come from greater organizational agility and routing between processes.

13. ***Faster processing of business critical activities has provided the biggest value for 53% of respondents.*** 45% cite their biggest value from fewer errors and exceptions processing.

14. ***Payback has been realized within a year for 41% of respondents of which 17% cite ROI within 6 months.*** For 25% their ROI was within 18 months.

Technical Requirements

15. ***Analytics and reporting are considered mandatory for 64% of respondents.*** User defined process mapping and modification is the top requirement for 51%.

16. ***Mobile and cloud support are seen as important for 67% of organizations.*** Production of executable files is considered irrelevant (47%).

17. ***Audit trails and executed process must be secured for 89% of respondents.*** Security over performance metrics and reporting is key for 74%.

Purchase and Spend

18. ***When considering a supplier, functionality (87%) and scalability (66%) rate high.*** Out-of-the-box processes are a high consideration for 41% or respondents.

19. ***Purchases will be made within a year by 22% of respondents with 12% citing within 6 months.*** In that same timeframe, those who have solutions plan to expand within a year (38%) and of those, 20% plan expansion within 6 months.

20. ***The line-of-business managers will conduct the evaluation process for 35% of respondents.*** The decision will be made by the CIO/COO for 68%.

THE IMPACT OF SHAREPOINT

2016

The Impact of SharePoint - 2016

The SharePoint platform has evolved over time, positioning to become a digital workspace and universal interface of sorts. SharePoint is being used in support of collaborative efforts of all kinds including co-authoring of documents, information sharing, and an integration point with all enterprise information sources. In this study, we find that there is a slight increase over last year of SharePoint use in an Enterprise Content Management (ECM) and Document Management (DM) role with 28% of respondents citing it is their only (10%) or main (18%) ECM/DM system.

And yet, user adoption has been and continues to be something of an issue for 58% of our respondents with indication that poor or inadequate training and lack of management support are still the perceived reasons. This is an indication of human deficiency, rather than technological deficiency. It is not the technology that is failing the organization in as much as it is the organization failing the technology.

For some organizations each new version of SharePoint is welcomed and embraced, but for others, it is a struggle to keep up. Surprisingly, as SharePoint 2016 is being introduced, there are organizations that are just now moving to SharePoint 2013 and some only to SharePoint 2010. At this time, 17% of our respondents indicate they will increase their spending to upgrade to SharePoint 2016, with an additional 13% indicating they will make their initial SharePoint 2016 purchase.

When it comes to SharePoint meeting organizational expectations, nearly half of our respondents are happy with SharePoint and the on-going product roadmap, with half also in agreement that SharePoint is providing good value for the cost. Typically, these organizations have a focused plan, working as a cross-functional team rather than total reliance on IT to make it all happen. This should also be an on-going practice for every aspect of a SharePoint project from initial purchase through upgrades and expansion, to ensure SharePoint is addressing the business needs and solving business problems, and not put in place for technology sake alone.

Key Findings:

General Perspectives

1. ***SharePoint is the only or main ECM/DM system for 28% of organizations.*** Thirteen percent see SharePoint as important for their overall ECM/DM environment.
2. ***Eleven percent of organizations have reached a plateau in terms of SharePoint adoption.*** 22% say their SharePoint adoption is facing challenges from the user community.
3. ***More than a quarter of respondents say they are still using SharePoint 2010 with 41% citing they are using SharePoint 2013 as their live primary version.*** At this time, only 2% say they are live with SharePoint 2016 and 19% with SharePoint Office 365.
4. ***When it comes to the enhancements found in SharePoint 2016, 43% say they are somewhat aware of what SharePoint 2016 offers, while 29% indicate they have no awareness at all.*** Only 23% of respondents indicate they understand what SharePoint 2016 offers.

Project Status

5. ***Forty percent of organizations say their SharePoint implementation was not a success.*** Inadequate user training (67%), hard to use (65%), and lack of senior management support (64%) are cited as reasons for SharePoint projects stalling or failing.

6. ***Revitalization of their SharePoint project through user training is a priority for 58% of organizations, while 50% plan to update and enforce their Information Governance policies in relation to SharePoint.*** For 35% the focus is on positioning and reconfirming that SharePoint is or will be their primary ECM system.

User Perceptions

7. ***When looking at SharePoint as an ECM/DM solution, 43% prefer using their file-share application for everyday content.*** When looking at SharePoint as a collaboration tool, 58% say it is popular for project and team site use.

8. ***Functionally, 50% say that internal facing SharePoint sites are in wide use, as are the collaboration and team sites (44%).*** However, when it comes to email management with SharePoint, 76% say they do not use it.

9. ***Looking at SharePoint from a process and enterprise connectivity perspective, 72% of organizations show no support for mobile device use.*** Nearly a quarter says they widely use enterprise search, and 19% cite wide use of SharePoint for review and approval processes.

10. ***While support for mobile seems lacking, 40% say a mobile application of SharePoint is very important for controlled document access.*** Thirty-five percent see a mobile application of SharePoint as important in providing intranet capabilities on a mobile device.

11. ***Change management is a major issue for 58% of organizations challenged with user reluctance to use SharePoint, more so than the lack of technical expertise cited by 51%.*** More than one-third says it is inconsistent metadata and classifications presenting the biggest issue for their organization.

Cloud/Mobile/Access

12. ***Twenty-three percent of organizations plan a hybrid environment with the majority of their information hosted on SharePoint Online/365 with some remaining on-premise.*** For 17%, the plan is to move everything to Microsoft's hosted SharePoint Online/365.

13. ***Nearly one-third of organizations see a move to the cloud/365 as a strategic platform vision, while 22% see it as taking advantage of the latest SharePoint updates.*** 29% view a move to the cloud/365 as a move toward cost savings in IT.

14. ***When it comes to cloud use, 31% of organizations are using SharePoint 365/SharePoint Online.*** When asked about issues or concerns with using a cloud or hybrid SharePoint solution, 58% feel security is an issue, while 53% feel control over what is managed in the cloud is an issue.

15. ***Accessing SharePoint is done from home using a VPN connection for 50% of respondents, while 36% say they get there through their Outlook client.*** Outside access to SharePoint is discouraged by 15% of organizations.

Add-ons and Enhancements

16. ***SharePoint out-of-the-box is good for 64% of organizations.*** Widgets and web parts (51%), and 3rd party add-on products (32%), are also in play for SharePoint optimization.

17. ***Regarding 3rd party SharePoint add-on products, 30% of organizations plan to implement storage and archive management with 11% citing it is in use now.*** Twenty-eight percent plan to have integration with Outlook, while 23% say this is already in place today.

18. ***Organizations are planning for and implementing SharePoint auxiliary products for data migration (50%), and an additional 24% say they are using this now.*** Some organizations (23%) see the benefit in planning for and using (13%) SharePoint Auxiliary products for digital signatures.

Governance

19. ***Twenty-five Percent of organizations do not differentiate records from content, with 21% admitting they do not have good Information Governance (IG) policies in place.*** Thirty-percent say they do not capture records, while 15% say they use a combination of SharePoint Records Center and manage-in-place to do so.

20. ***When asked how SharePoint aligns to their IG policies, 80% say their metadata and taxonomy (45%) are not aligned, or there are no policies (35%).*** Sixty-two percent cite retention and disposition as their main misalignment with their IG policies.

Futures, Opinions, and Spend

21. ***Twenty-nine percent of organizations will build ECM, DM, and collaboration around SharePoint, with 10% planning to move to SharePoint 2016.*** Twenty-seven percent will increase spending to integrate with other repositories, while 26% will increase spending on add-on products.

22. ***Looking at value versus costs, 40% agree and 8% strongly agree that they are happy with SharePoint and the on-going roadmap.*** 42% agree and 8% strongly agree that SharePoint provides good value to costs.

PAPER-FREE 2016

Are We There Yet?

Paper-free 2016 - Are we there yet?

Since the 1980s, we have been hearing about paper-free businesses and the drive to move toward a more digital workplace. At the time, the technology and people were not ready for this transformation. Today, the approach to digitally transform businesses has shifted from a technology first perspective to a more business centric approach, with paper-free processes becoming a focal point and opportunity for many organizations.

Yet despite widespread acceptance that reducing and removing paper is a best practice, we find that only twenty-five percent of our 2016 respondents indicate they run a clear/paper-free environment; the good news is that this figure is up from 18% in last year's report. Discouragingly, 65% of our respondents say they are still signing on paper, even though there is wide and growing acceptance of digital and eSignature technology. Despite this, and the fact that paper is still a somewhat dominant media in business, we see a 3% increase over the 2015 report, with 40% of our 2016 respondents indicating they have a number of paper-free processes and will do more in the future.

It is obvious that while interest and motivation toward a paper-free business environment is increasing, there is still a long road ahead. The human factor is still the primary reason for paper use in handling, reading, and note taking (47%). While benefits are acknowledged, and interest seems to be growing, there is still a lack of management initiatives to move away from paper (47%). Our respondents also cite a lack of understanding and awareness when it comes to paper-free options (39%), indicating a need for education on how to approach and initiate a paper-free project.

In this comprehensive report, we took an in-depth look at the amount of paper in the office, the impediments to removing it, the take up of digital mailrooms and multi-channel capture, and the increasing exploitation of mobile and cloud. Above all, we look at the progress towards paper-free processes, the triggers and decision-making processes, and the issues, benefits and ROI.

Key Findings:

In General

1. ***Twenty-five percent of 2016 respondents indicate they run a clear/ paper-free environment; up from 18% in last year's report.*** 65% say they are still signing on paper.
2. ***Forty-three percent of respondents say paper is decreasing in their organizations somewhat (35%) or rapidly (8%).*** 35% say it is stable.
3. ***A three percent increase is seen over the 2015 report, as forty-percent of 2016 respondents indicate they have a number of paper-free processes and will do more.*** 14% say they are actively looking at every process.

Capture

4. ***Paper in Human Resources (HR) is decreasing in the areas of recruitment (49%) and employee lifecycle (48%).*** For 41% it is decreasing in Accounts Payables (AP) and Accounts Receivables (39%).
5. ***The greatest paper reductions are seen in records management by 39% of our respondents, with 34% citing AP – invoice processing.*** For 27% the greatest reduction is seen with technical documents.

6. ***The human factor is still the primary reason for paper use for handling, reading, and note taking (47%), along with a lack of management initiatives to move away from paper (47%).*** Our respondents also cite a lack of understanding and awareness when it comes to paper-free options (39%).
7. ***Fifty-six percent of respondents are looking to automate manual processes with document classification.*** For 30%, there is a move to upgrade their technology.

Inbound Content

8. ***The amount of paper arriving at the door is decreasing somewhat (41%) to rapidly (9%).*** Digital inbound documents are increasing somewhat (47%) to rapidly (19%).
9. ***Demand for paperless communications is somewhat on the rise for 46% of respondents while 19% are seeing a rapid increase in demand.*** Thirty-eight percent of respondents say that they now receive more digital invoices than those in paper form.

Digital Mailroom

10. ***Fourteen percent of respondents have a distributed, multi-channel approach across paper and digital content – up slightly over 2015.*** For 29%, things are adhoc in relation to scanning, which is down slightly over 2015.
11. ***A hybrid approach of centralized and distributed capture is in place for 29% of respondents.*** 18% cite use of centralized capture with multiple desktop scanners, and an additional 18% cite use of distributed capture at their branch offices.
12. ***Forty-one percent of respondents report better quality in downstream data capture and faster-post-box to in-box times equally.*** For 37% there are equally fewer operational staff and faster turnaround times for customers.

Processes

13. ***Responsibility for radical process review falls on the line-of-business or department head according to 26% of our respondents.*** It is the top-level executive who is responsible for radical process review in 22% of respondent organizations.
14. ***When it comes to converting key business processes, Accounts Payables (AP) is the top priority according to 30% of respondents.*** For 27% it is Accounts Receivables (AR) and Records Management—cited equally.
15. ***Dedicated workflow/BPM capabilities are in place for 7% of our respondents – up slightly over 2015.*** 36% of respondents say they have a combination of paper and digital content in the same workflows.

Triggers

16. ***Mandates from above are the motivating trigger for the first paper-free process according to 48% of respondents.*** 35% are citing cost savings as the initial trigger for their first paper-free process.
17. ***When it comes to additional initiatives to eliminate paper from business processes, respondents cite regular process reviews, and cost savings equally (50%).*** Improved responsiveness falls next for 42% of respondents.

Mobile

18. ***Mobile is seen as important and in the planning stages for 32% of our respondents.*** Thirty-three percent of respondents say they support AP with mobile capture apps.
19. ***The most popular content to capture are images for use as records (28%).*** Twenty-three percent say they use portable devices to capture documents as images only.
20. ***Twenty-three percent of respondents indicate they use process specific mobile apps.*** Twenty-seven percent say they are using an ECM supported platform.
21. ***Biggest mobile capture benefit cited by 44% of respondents is the speed of data availability.*** Thirty-three percent say the biggest issue is bandwidth and security equally.

Cloud

22. ***Forty-three percent of respondents say removal of paper from processes should be a constant objective.*** Eighteen percent of respondents say they are trying to understand and strategically place cloud use.
23. ***When it comes to outsourced services, 40% of respondents say they plan to use more document process/data capture beyond scanning.*** Fifty-four percent of respondents envision more of a hybrid cloud and on-premise deployment.

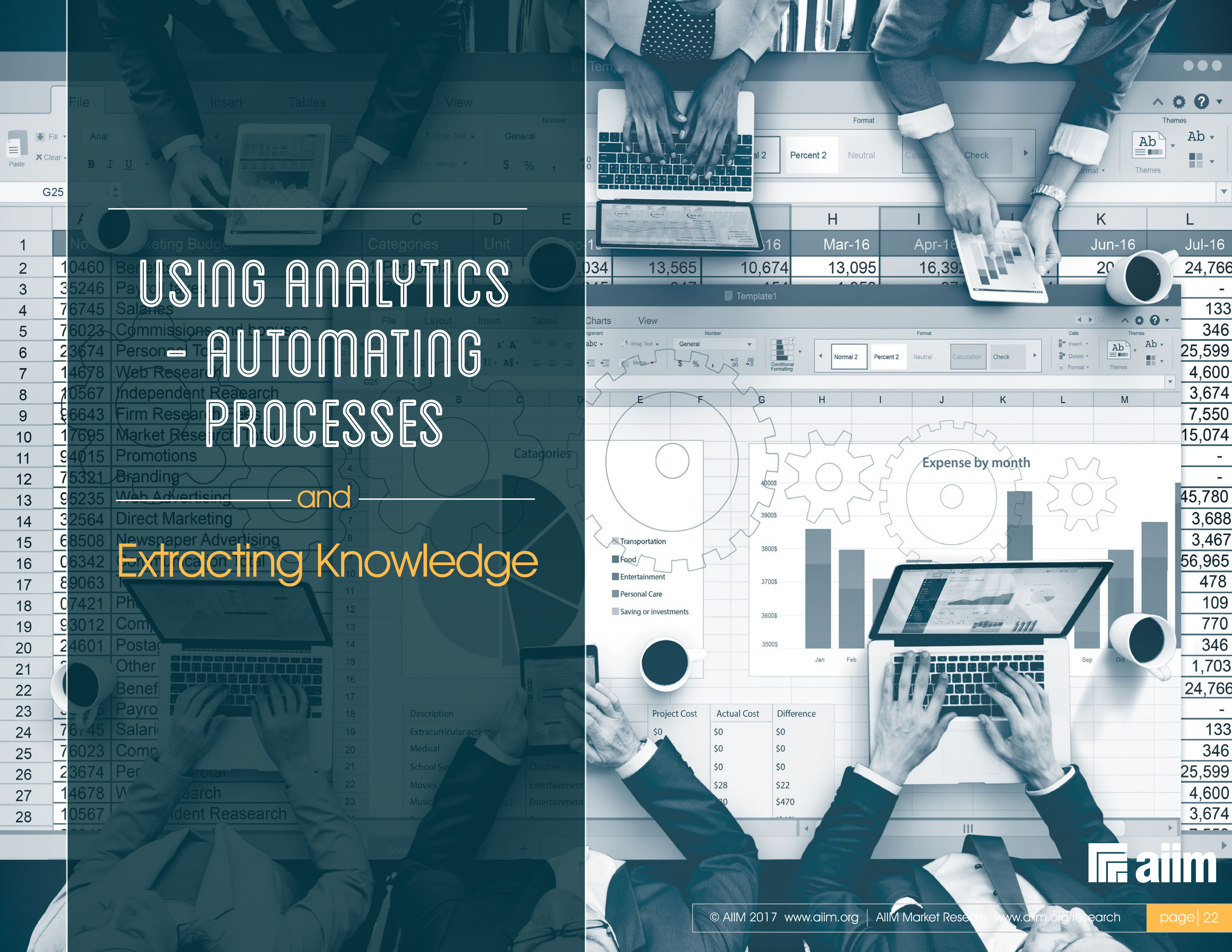
Opinions and Spend

24. ***Fifty percent of respondents say they will spend more on workflow and BPM.*** Forty percent of respondents plan to spend more on electronic forms and data capture applications.

25. ***When it comes to purchasing preferences, 48% will turn towards a vendor direct purchase.*** Sixteen percent of respondents will turn to a Systems Integrator or Value Added Reseller (15%).

26. ***Key lessons learned are having executive level buy-in (42%) and stakeholder involvement (33%).*** Key benefits identified are faster customer response (50%), and staff reductions with higher productivity (42%).

27. ***Measurements used by our respondents are benefits to the business (46%), and process cycle times (36%).*** Payback is possible within 3 months according to 9% of respondents, while 36% indicate payback between 3 and 6 months.



USING ANALYTICS – AUTOMATING PROCESSES

and

Extracting Knowledge

Using Analytics – Automating Processes and extracting knowledge

Beyond "big data" style business intelligence, analytics is driving auto-classification, content remediation, security correction, adaptive case management, and process monitoring and modeling. The first step for many analytic processes is capture and recognition – from paper, and from other multiple inbound channels.

Something to consider when discussing analytics for process automation and business insight, is that information can and is being captured from multiple sources, including social media, blogs, websites, and even remote devices – the Internet-of-Things. According to 27% of our respondents, content analytics (CA) is seen as essential now, with 59% citing they see it as essential within the next 5 years.

Regarding the capture of data from remote devices, 43% of respondents indicate data is being captured from security systems (access readers, cameras, etc.) and from facilities equipment (HVAC, lighting, etc.) by 25%. Additionally, 51% of our respondents are capturing data from peripheral devices like multi-function copiers, etc.

In this comprehensive report, we took an in-depth look at the take-up of analytics applications, the success factors and outcomes, integration across repositories, and the issues, benefits and ROI resulting from analytics use. Above all, we look at the progress of organizations moving towards the incorporation of analytics to automate their business processes, and extract valuable customer and business knowledge to enhance their decision-making processes.

Key Findings:

General

1. ***Twenty-seven percent of respondents see content analytics as essential now.*** Fifty-nine percent see it as essential within the next 5 years.

2. ***Fifty-nine percent of respondents feel that their organization is good (40%) to excellent (9%) at ECM.*** Fifty-eight percent admit they are poor at using auto-classification.

3. ***Thirty-nine percent of respondents are challenged with poor insight into their business operations.*** Forty-three percent are addressing challenges related to duplication of content creation.

4. ***Sixty-four percent of respondents see content analytics as a way to improve productivity and remove manual steps.*** For 62% content analytics is seen as a way of providing business insight.

5. ***For 43% of respondents, data is being captured from security systems (access readers, cameras, etc.) and from facilities equipment (HVAC, lighting, etc.) by 25%.*** Fifty-one percent of respondents are capturing data from peripheral devices like multi-function copiers, etc.

6. ***Twenty percent of respondents see content analytics as the way to go and are proactively working on it.*** Fourteen percent see it as useful but no one is currently assigned to investigate it further.

Inbound/Process/Search

7. ***Twenty-five percent of respondents say their processes are flowing faster and more smoothly as a result of using inbound analytics.*** Fourteen percent cite improved governance and compliance.

8. ***Content analytics is driving auto-classification for tagging and routing to archive by 22% of respondents.*** Twenty percent indicate they trigger inbound processes based on content analytics used for inbound content.

9. ***When it comes to assigning security and access controls, 25% are using auto-classification for this purpose.*** 21% are using it for metadata allocation and correction.

10. ***Six percent of respondents utilize contextual search across multiple repositories.*** For 22% it is simple search across multiple repositories that are still prevailing.

Business Insight

11. ***Sixty-one percent of respondents feel the intelligence derived from content analytics is most useful in providing better insight and decision-making capabilities.*** Thirty-seven percent feel it is improved product or service quality.

12. ***Fifty-two percent believe automated content curation would be very useful.*** Eighteen percent indicate they are using it on websites, blogs, and news feeds (3%), subscribed libraries (6%), and internal resources (9%).

13. ***E-discovery with contextual analysis plays a role for 7% of respondents.*** For 13% e-discovery tools are in place without contextual search capabilities.

14. ***Fourteen percent of respondents use automated analysis on social streams, communities, news feeds, and inbound communications.*** Automated analysis of helpdesk conversations is in the plans of 15% of respondents.

Application Use

15. ***Thirty-two percent of respondents indicate having more than one content analytics application in place.*** Fifteen percent say they are currently planning for it.

16. ***When it comes to content types being analyzed, 27% say they have a wide variety across multiple repositories.*** Twenty-one percent say their content is not "big" but they are using complex analytic techniques.

17. ***Regarding linkage to transactions or structured data, 40% of respondents say they have tied their blog content projects to multiple transactional systems.*** Thirty-two percent say they link to singular systems like ERP, Finance, and HR.

18. ***Return-on-Investment for big content projects has been realized within 12 months for 26% of respondents with 10% of those indicating ROI within 6 months.*** Forty-four percent are measuring processing times for ROI and 39% reduction in manual processes and activities.

Opinions and Spend

19. ***Forty-two percent will be spending more on inbound workflow automation over the next 12 months.*** Forty percent of respondents plan to spend more on content analytics for business insight.

Conclusion

The evolution of information management and process automation has followed a similar path to that of ERP. Initially, individual applications carried out specific information-management and process centric tasks like imaging and capture, records management, content creation, workflow, knowledge management, etc. As users continue to seek out more integrated solutions, vendors offer pre-integrated solutions or partnership packages. Mergers and acquisitions closely follow this shift as the concept of the single-vendor, enterprise-wide, modular suite is resurrected.

As these suites become more massively capable, they also tend to become more massively complex. Inevitably, users seek more agile solutions, and niche best-of-breed products regain focus, as they are quicker to take to the technological high ground. Meeting the information-sharing needs of the mobile workforce, social, cloud, and the mobile appification of ECM grows along with the use of hybrid environments combining on-premise solutions with cloud services. Some users split their information management into three tiers, allocating their legacy systems to handle the robust and compliant records requirements, adding new and agile cloud services for collaboration, and using lighter-weight or industry-specific document, project or case management systems in between.

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

LOOKING AT

2017

Lookng at 2017 - Continued Changes

In my view, 2017 will bring about continued changes in the supplier landscape through mergers and acquisition, and some spin-off companies who do not fit the "corporate mould", yet have plenty to offer in terms of technology capabilities. It is also likely we will see significant focus on the Small to Medium Business (SMB) space as more cloud and outsourced services become available and offer more affordable options for capture, analytics, and storage.

There is also the possibility that the term ECM may evolve or give way to an even broader term encompassing both information and process management as a whole, since they are increasingly becoming more integrated across the enterprise, and focus is sharpened on the interactions between both as more organizations proceed through their digital metamorphosis. Perhaps we will see the term IPM become the replacement for ECM as the overarching umbrella term.

When looking at the overall information lifecycle, attention is steadily growing at opposite ends with more organizations seeking to address content creation more intelligently and in ways that this information can be designed for multiple use rather than single purpose and constant recreation.

Likewise at the opposite end, defensible disposition has been steadily gaining attention with organizations realizing that simply deleting information is not always sufficient. In many cases, there should be defined processes to follow, ensuring that information ready to be disposed of according to a set of information governance policies is done so with documented proof it was carried out in a compliant and defensible manner.

Process automation and the appification of ECM will increase beginning with capture and extending through to disposition. While workflow technologies will continue to be implemented, I think that the combination of recognition, analytics, and BPM will increase overall for the purpose of creating an automated information ecosystem that classifies, secures, and manages information of all types with minimal human intervention. In this way, the human element focuses more on transacting business rather than managing the information.

Recommendations

- If your IM initiatives are stalled or struggle with user adoption, seek senior management assistance to create a new initiative. Ask users what they dislike, and look to improve – perhaps by adding less onerous or automated classification.
- In order to cope with constantly increasing volumes, ensure that lifecycles are defined for all types of content in each type of repository, and implement retention and deletion policies that are defensible under your IG policy.
- If your systems are clogged up with un-tagged and un-classified content, use content analytic tools to separate the ROT, and then add value to the retained content. Avoid this problem in the future by using auto-classification or assisted classification tools.
- If your IM systems are unable to match the access, process, security and compliance needs set out in the IG policy, look to re-deploy, consolidate or replace.
- As your ECM/BPM/RM systems become more and more business-critical, be sure to keep them up-to-date, taking advantage of the latest capture capabilities and smart processes.
- As an alternative, moving the most sharable or collaborative content to a hybrid cloud will make it much easier to connect remote, mobile and third-party users, and may head-off unofficial use of cloud file-sharing sites.

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Here at AIIM, we believe that information is our most important asset. And we've always felt this way – even way back in 1943 when this community was formed as the National Micrographics Association and later became the Association for Information and Image Management.

Sure, the technology has come a long way since then, and the variety of the information objects we're managing has changed a lot, but one tenet has remained constant: we've always focused on the intersection of people, processes, and information. We help organizations put information to work.

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