



It's not Information Governance,
It's Information Opportunity



AIIM Executive Leadership Council

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Executive Summary

We hate information governance. We love information governance. Wait, it's data governance. Everyone needs to do it. No one is "really" doing it. It's just records management in disguise. It sounds an awful lot like enterprise content management. It doesn't matter to the C-suite. You need to make it matter to the C-suite. It's boring. It's exciting. It's hard.

It's this. And it's that. And to most executives, it's confusing.

Let's be clear: organizations need to govern information. Whatever you want to call it, making sure you've got your digital content under control and aligned to your business objectives is key to success. Being a "digital enterprise" without understanding where your digital information "lives" is a recipe for disaster.

"We care about Information Governance (IG), but as part of a much bigger thing."

As we think about the future of information governance and speak to organizations large and small, a couple of things are evident:

- **Confusing Terminology:** The term "Information Governance" itself is charged with many meanings, largely dependent on the role of those hearing the term.
- **Frustration and Noise:** Organizations worry that governance will continue to be viewed through a risk rather than an opportunity lens, hampering the ability to make full use of siloed content and information management systems. They worry that the data deluge problem will be solved by buying more storage space, rather than establishing automated governance processes. It is clear that a lot of the conventional reasons for considering Information Governance -- storage is not really as cheap as it seems, the sheer volume created by the Internet of Things, the need for records management to be more encompassing than it currently is, the notion that information "should" be valued on financial statements -- are not sufficient to raise Information Governance to a strategic imperative.
- **Opportunity:** Rising privacy and security concerns from customers represent a key potential driver for expanding information governance initiatives. Effective governance is a pre-condition for simplifying the complex spider web of unconnected applications and data that plague every CIO -- however the simplicity argument is often left out of the Information Governance story. The last opportunity is the toughest -- strategic alignment.

Ultimately, conversations about Information Governance need to change:

- It's not just information governance, *it's information security.*
- It's not just Information governance, *it's information simplicity.*
- It's not just information governance, *it's information value.*

The Information Governance Trendscape

In June, we posed a series of information governance hypotheses/trends to 52 senior information management executives drawn from organizations that both provide technology solutions and use those solutions. We asked them to review these information governance hypotheses/trends against two criteria:

1. *How important is this hypothesis/trend to end-user organizations?*
2. *How likely is this hypothesis/trend to occur in the next 18 to 24 months?*

The result is a relative set of priorities that allows organizations to separate hype from reality, and focus their efforts on those areas that are **BOTH** important **AND** likely.

Low importance, high likelihood = Should already have been addressed	High importance, high likelihood = Focus on this
<ul style="list-style-type: none"> ■ <i>There will be a shortage of Information Governance talent as records managers are unable to transform themselves.</i> 	<ul style="list-style-type: none"> ■ <i>The siloed nature of content and information management systems will prevent implementation of comprehensive governance plans.</i> ■ <i>Governance will continue to be viewed through a risk rather than opportunity lens.</i> ■ <i>Rising privacy and security concerns from customers will force organizations to embrace governance.</i> ■ <i>Despite experts' handwringing, we'll settle for "good enough" for governance.</i> ■ <i>Organizations will solve the data deluge by buying more storage space, not by establishing processes.</i>
Low importance, low likelihood = Spend your time elsewhere	High importance, low likelihood = Keep on the radar screen; get ready
<ul style="list-style-type: none"> ■ <i>Information will become an asset that will show up in financial statements.</i> ■ <i>The cost to manage information on "cheap" storage will rise so that organizations HAVE to pay attention to governance.</i> ■ <i>Information governance will become a function of and driven by IT rather than by records managers.</i> ■ <i>The Internet of Things will push governance boundaries to a micro-content scale that is massive.</i> ■ <i>The volume, variety, and velocity of information will kill all manual processes for information management.</i> 	<ul style="list-style-type: none"> ■ <i>Governance will truly become a strategic concern of the enterprise.</i> ■ <i>Governance will be driven by analytics.</i>

The Context Behind The Information Governance Trendscape

A few quick words on the origins of this report: it is a summary of two sets of deliberations – one in the US and another in UK – of leading content and information management executives and CIOs around the increasing importance of Information Governance.

Here's how the ELC works: The meetings are organized by AIIM and facilitated by a well-known futurist, Thornton May. Thornton's job is to bring together the smartest people he can find to lead the Council in discussing the implications of an issue whose impact is not immediately clear. The act of faith inherent in these meetings is the assumption that the collective discussion will lead to insights, observations, and conclusions that were not readily apparent at the beginning of the meetings.

"Information governance is necessary, but it's not sufficient."

The data in the Trendscape survey and our discussions at the two meetings point to three conclusions:

- **Confusing Terminology:** The term "Information Governance" itself is charged with many meanings, largely dependent on the role of those hearing the term.
- **Frustration and Noise:** Organizations worry that governance will continue to be viewed through a risk rather than an opportunity lens, hampering the ability to bring siloed content and information management systems under control. They worry that the data deluge problem will be solved by buying more storage space, rather than establishing automated governance processes. It is clear that a lot of the conventional reasons for considering Information Governance -- storage is not really as cheap as it seems, the sheer volume created by the Internet of Things, the need for records management to be more encompassing than it currently is, the notion that information "should" be valued on financial statements -- are not sufficient to raise Information Governance to a strategic imperative.
- **Opportunity:** Rising privacy and security concerns from customers represent a key potential driver for expanding information governance initiatives. Effective governance is a pre-condition for simplifying the complex spider web of unconnected applications and data that plague every CIO – however the simplicity argument is often left out of the Information Governance story. The last opportunity is the toughest -- strategic alignment.

Confusing Terminology

It's clear that "information governance" has both a definitional problem and a branding problem.

Like most terms, the meaning of the term "information governance" is largely contingent on both the role and perspective of the person using the term and the person hearing the term. This problem is compounded in the case of "information governance."

For some, the term is a convenient strategic envelope for a set of tactical records management concerns -- "We have a hard time getting anyone to get serious about records management, so let's elevate it to information governance." For others, it is the most uber of all uber information concepts, covering everything from corporate governance to managing the individual desktop.

Just how confused is the labeling around IG? When asked to list the first image, word, or phrase that leaps to mind when they heard "information governance," a roomful of executives offered a variety of different, and often unflattering, phrases: complexity, lack of freedom, cost, control, boring, confused, paperwork, sluggish, too much effort, jump through hoops, analytics, business intelligence, compliance, data governance, data hygiene, defensible disposal, document management, e-discovery, enterprise architecture, enterprise content management, information life cycle, information risk [associated with how employees handle information], machine learning, master data management, metadata, model management, privacy, records management, regulations, risk, Snowden, structured/unstructured data, and Target (the retail store).

Clearly we all have a lot of work to do.

One way of defining a thing is to establish what it isn't.

Information governance is not the same as compliance. You do need to have control of your information in order to comply with various regulations, but information governance is about a broader opportunity.

Information governance does not equal IT governance. Managing the hardware and software that manages the information is not the same thing as IG.

The list can go on and on:

- It's not information governance; *it's corporate governance*
- It's not information governance; *it's information value*
- It's not information governance; *it's information security*
- It's not information governance; *it's information technology governance*
- It's not information governance; *it's information stewardship*
- It's not information governance; *it's information strategy*
- It's not information governance; *it's INFORMATION GOVERNANCE.*

The conversation needs to move beyond the lower case "information governance" as a way to meet compliance issues, avoid risk, and manage records. We all need to think of Information Governance in capitals, a neon signpost blinking at us across a wasteland of broken and misused information.

It's opportunity. It's value. It's what you need to do.

"Information Governance has been hijacked by the records management community."

AIIM President John Mancini sees it as a strategic concern:

"Organizations are systems of information networks. They only operate effectively when there are clear and predictable information flows within and between these networks. Without intervention, the resulting information chaos will threaten the viability of the entire system."

Per Neale Stidolph, Head of Information Management at Lockheed Martin, *"For Governance to work, everyone has to be involved."* **Lisa Welchman, President of Enterprise Digital Governance Solutions at ActiveStandards,** gets to the heart of what we need to focus on: *"What should we care about and who should do the caring?"*

Thornton May, Futurist & Executive Director, IT Leadership Academy,

"While information governance may not need to be relabeled, it definitely needs to be re-thought. Information governance has to be positioned as something that makes the organization money and/or delivers on the organizations mission."

Frustration and Noise

There is a great deal of collective frustration in our inability to flip the conversation about information governance from a negative one of cost and avoiding costs and managing risk to a conversation about the value of doing. Per Thornton May, *"Information governance as it is practiced today in the vast majority of organizations in every vertical market is rudderless and lurching from crisis to crisis."*

Khalid Mansour, Vice President of Consulting Enterprise information Management - North America and Middle East at Cognizant, describes why the adoption rate of Information Governance is so low:

- Establishing Information Governance is perceived to have no direct business benefit
- Challenges in business buy-in, funding, and organizational adoption of governance abound
- Information Governance is seen as critical but highly political, complex, long-term, and multi-year initiative.
- High levels of sustained business and IT commitments are required
- There's a "one size fits all" approach to Information Governance
- There's a lack of metrics-driven measurement of the benefit of Information Governance
- Total Cost of IT Ownership (TCO) is rarely measured or tracked

Thornton May, Futurist & Executive Director, IT Leadership Academy,

"The one thing that everyone can agree upon is that the status quo is not working. Symptoms are everywhere with comments like 'We need help to govern the data in these warehouses since the data is always wrong, incomplete, or erroneous' are the norm rather than the exception."

That's not to say that risk and compliance concerns aren't real and complicated. Per **Lesley Holmes, Information Manager for Nottinghamshire County Council,**

"One of the challenges is dealing with compliance mandates that range across the Data Protection Act, Freedom of Information Act, Environmental Impact Regulations, Information Governance Toolkit (Health), Public Services Network Code of Connection, Security Policy Framework, and a host of others."

So how do you bake Information Governance into the DNA of your organization? There are multiple "tribes" of people within organizations concerned with Information Governance: records managers, enterprise architects, compliance people, infoseekers, risk managers, boards of directors, CMOs, CEOs, data scientists, DBAs, purists, and others. They all bring a different viewpoint on governance issues.

The challenge is that amidst all of the various compliance and risk mandates pushed from "corporate," real people are busy trying to get their work done. Many of them are overwhelmed by information. They simply don't care about things like file plans and retention schedules and legal holds and all of the other "noise" they hear whenever the conversation turns to information governance. **John Newton, Co-founder, CTO and Chairman of Alfresco Software and Co-founder of Documentum,** notes that *"effective governance must be invisible governance."*

Critical to reducing the amount of "noise" relative to the Information Governance conversation is greater clarity about exactly how it relates to the day-to-day job of every employee. The mindset for this cannot be the nanny state -- or employees will continue to ignore information governance mandates in the necessity of just getting the job done. Per **Daniel Barchi, CIO of the Yale Health System and the Yale School of Medicine,** *"It is said that the challenge is 80% people, 15% process, and 5% technology. We often focus too much on the technology at the expense of the other 95%."*

Thornton May, Futurist & Executive Director, IT Leadership Academy, describes this challenge of navigating between the invisibility of the solution and the accountability for the result. *"Thomas Jefferson, co-crafter of one of the most enduring set of governance mechanisms to ever emerge from the mind of man (the American system of democracy) sets as Principle #1 'Power to the People' (i.e., self-governance). The people must take responsibility for the decisions made and the processes whereby they are arrived at. This gives rise to Necessity #1. If the people are to be self-governing, they must be educated. They must understand both the big picture and the local particulars. Employees, executives, and customers have to be part of the information governance solution. We can't simply create policies that require other stakeholders to do all the heavy lifting. Information Governance is a borderland. It falls between the cracks of the org chart."*

One stumbling block to the creation of information governance is the quest for perfection. **Information strategist Erik Hartman** says, *"When it comes to information our ambitions are way too high. It takes time, and you can't skip steps on the way to maturity."* Hartman divides maturity into five levels: unmanaged, beginning, learning, integrating, and pro-active. *"For Information Governance, these levels equal no policy, some policy, decentralized, centralized, and, finally, an optimized policy. You then need to look at your organization, information, and technology."*

Opportunity

There are three primary levers that organizations need to examine to elevate information governance from a tactical to a strategic concern.

The first lever is that rising privacy and security concerns from customers represent a key potential driver for expanding information governance initiatives. No one wants to be the next security breach or cloud hack and wind up on the front page of the *Wall Street Journal*. Privacy and security is usually at the top of every C-level "what keeps me up at night" list, and this can be used to help focus attention on the importance of information governance.

Some believe there are risks in using privacy and security exclusively to "sell" information governance internally. **Monica Crocker, Group Records Coordinator at Wells Fargo**, is one, "Unless you are a compliance driven organization, security and privacy should be a footnote. While a way to get the attention of decision-makers, both are addressed in a well-rounded Information Governance program. Focusing exclusively on privacy and risk could relegate Information Governance to the IT 'when we can get to it' list."

The second lever is that effective governance is a pre-condition for simplifying the complex spider web of unconnected applications and data that plague every CIO -- and the need for *simplicity* is often left out of the Information Governance story. **Louis Gutierrez, board member at Harvard Pilgrim Healthcare and former CIO of the Commonwealth of Massachusetts**, believes that tying governance to greater organizational and operational simplicity is critical -- "How can I save on keeping the lights on so that I can spend more on innovation? Unmanaged complexity is a tar pit for organizations and industries. Its principal effect is loss of agility. I don't care about volume, but how can Information Governance help me manage complexity?"

Thornton May, Futurist & Executive Director, IT Leadership Academy,

"We are on the cusp of a 'foundational moment' regarding information governance. A foundational moment is an instance when the decisions you make and the actions you take fundamentally influence ALL that follows. Examples of foundational moments include the deliberations surrounding King John signing the Magna Carta in 1215, the collaboration, courage and creativity inspiring the Declaration of Independence in 1776 and the deep thinking and foresight that permeated the Constitutional Convention of 1787.

Foundational moments tend to follow what **H. James Dallas, the just-retired Chief Operating Officer at Medtronics**, calls 'wilderness moments' - times when you don't know what you should be doing but you definitely know that you need to be doing something else. Wilderness moments are to be expected. They are not, however to be accepted."

The last lever is the toughest -- strategic alignment.

Information governance has to be repositioned as relevant to enterprise mission and a possible source of competitive advantage. Those involved in the practice of messaging around information governance have to behave as if information governance is no longer just a hygiene factor. Using the framework of Geoffrey Moore, information governance has to migrate from Context (i.e., something you starve of capital and perform just “good enough”) to Core (i.e., a key source of differentiation deserving of sizable and ongoing investment).

You don't sell tools to the C-level, so at a minimum, the conversation can't begin with, “there's this software we can buy.” The C-suite cares about revenue. The head of a Major European Government Agency puts it this way: “*The bureaucracy of [agency] is big on governance. I'm big on adding value. I have not reconciled these two concepts yet.*” **Monica Crocker** believes that, “You have to align with what your organization cares about – figure out what that is to use as a lever for embedding Information Governance.”

Alison North, Managing Consultant at AN Information Ltd., makes the point about information alignment this way: “*Information is either an asset or a liability. I talk to executives about their information risk points and align these to the business strategy and link it into corporate governance – accountability, transparency, and fairness – then they start to get it. I try to talk about the business that they are in, the role that information plays in that, and how employees are using it. The C-suite care about financial risk and health and safety risk, they care about their accountability and how IG can help them deliver their strategy in the short term. Things like compliance, protection, and integrity don't really get their attention if you delve into the minutiae of each of these principles. Information Governance isn't something delivered separately from the business; it has to be integrated with every business process; understood by everyone.*”

Per Louis Gutierrez, there is a potential value even higher than information simplicity: “My question to us is, if we want information governance to matter, how does it matter for patient and population health?” **David Hammond, former VP, Information Technology at CareFusion**, describes the challenge as follows: “*The simple acquisition of more data no longer represents a competitive advantage in itself. Rather, it is the deliberate, intelligent and targeted use of data and technology that is likely to lead to disruptive information driven market opportunities.*”

Information Governance isn't just another way to talk about records management. Instead, Information Governance is foundational to an organization's success in the digital age. To truly transform into a digital enterprise, organizations need to know where their information is for risk, for discovery, and, most importantly, for adding value.

Information Governance is not simple. From a “doing” point of view information governance needs to be easy for end users. From an organizational standpoint, Information Governance is a project that is never over and will require continual attention and tweaking to encompass new tools, regulations, information, and opportunity.

Think bigger than risk. Make Information Governance a core part of your organizational strategy and reap the rewards.

Appendix 1 - Steps to Increasing Enterprise IG Mindshare

By Marie Felsbourg

Most organizations are at or near the end of transforming and/or updating transactional processes and systems to become more efficient and reduce cost. However the people, processes, and information that drive time to market and sales have been under-served. We see information management executed via an information governance framework as the next opportunity to drive growth and competitive advantage.

This will address enterprise information management challenges by:

- Identifying the value of your information assets whilst minimizing risk and ensuring regulatory compliance.
- Providing a framework of policies in which to manage all information both structured data and unstructured information.
- Providing the framework for defensible destruction.

An enterprise IG implementation requires strong executive ownership and engagement from representative stakeholders across the business – to be business-driven with IT as a stakeholder and supporter. It must apply end-to-end across the business and be closely aligned to both structured and ad hoc business processes and focus on creating value.

In our experience:

- Most IG initiatives do not have stakeholders across the enterprise; they are driven from a specific area such as legal, records management, risk, and security. This skews the perspective and limits success.
- Most enterprises approach IG from a compliance perspective rather than seeking to achieve more value from information or from lowering the cost of managing the information in an organization. This puts people off and can be counterproductive.
- Typically when implementing a solution the taxonomy is designed from analyzing business artifacts rather than the processes that create, search for, and reuse these artifacts to add business value. Focusing on business processes supports increasing value and supports users rather than just managing data.

Initiation of an enterprise IG project is not simple and requires a combination of a top down and bottom up approach:

- C-level support is required to provide leadership to the organization.
- All stakeholders across the business must be represented to get everyone on the same page, an understanding of the business value and ensure prioritisation from a funding perspective.
- Individual department, work group, and user support is required because without all areas of the organization being on board with the program it will be a failure.

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The gaining of organization mindshare can take considerable time – longer than a few months! We have seen organizations who have attempted multiple times over a number of years to get a real enterprise program in place and sometimes failing altogether. The challenge we see is that most organizations and individuals look at IG from the perspective of their own experience rather than looking at it holistically.

Based on our experience, to achieve the organizational mindshare for a successful IG program:

- Start with an information management strategy to identify the challenges the organization faces accessing and managing unstructured information. Run a series of workshops to educate and discuss issues and opportunities. Stakeholders must come from across the enterprise - management, functional experts, and end users. From there, build a high level business-centric IM strategy. Push for sign-off and gain the acceptance of it at a management level. Often, champions will emerge from the stakeholder group and they can drive management buy-in. The IM strategy workshops are the first step in the business shift where people begin to understand how they can benefit from valuing information as an enterprise asset – they start to see the connections and possibilities as well as understanding the power good governance can give them.
- Once the organization becomes aware of the need to change the way they work with information the next step is to build a high-level business case for the program of work identified in the IM strategy. Combine data on tangible and intangible benefits from industry studies with internal data gathered from surveys, reports, discussions, and observation. In one large global organization we had a huge response from highly paid knowledge workers who were asked to average how much time they spent daily looking for information to do their job. They spent in excess of one hour per day and this statistic combined with industry-based efficiency figures was perfect for the (successful) business case. This data also validates people's experiences across the organization and strengthens the buy-in.
- Armed with the IM strategy and business case plus supporting material, engage with C-level executives and support internal sponsors to get a project up that will deliver the required information management solution ensuring that current tools are leveraged. The development of an enterprise information governance framework is part of the foundation of the program but it also guides how the program will be designed – with information at the center and value as the goal.

Marie Felsbourg (marie.felsbourg@astral.com.au or +61-3-9690-7300) is the founder and CEO of Astral Consulting (www.astral.com.au) a boutique services company specializing in Information Management and Governance. Marie's key focus is working with business stakeholders to help them leverage the value of their information as a business asset.

Appendix 2 - 14 Facts About Information Governance

From AIIM's report: *"Automating Information Governance -- Assuring Compliance"*

- On the whole, organizations are stabilizing the volume of paper records, but electronic records are "increasing rapidly" in 68% of organizations surveyed. While 32% reported an actual decrease in their paper records, not one respondent could report a decrease in electronic records.
- Only 12% of respondents feel confident that they store only what they need to store. 42% are not confident about what is safe to delete.
- 43% feel that automated classification is the only way to keep up with rapidly increasing information volumes. 14% are already using it, but a further 35% have immediate plans for adoption.
- Of those already using auto-classification, only 10% have been disappointed with the results. In particular, classifying scanned documents has performed better than or as well as expected for 83% of users.
- Improved searchability, higher productivity and defensible compliance are given as the top three benefits from automated classification.
- The three biggest risks from failure of information governance are excess litigation costs, loss of intellectual property and damage to reputation. 24% have had a compliance issue around litigation and discovery in the last 2 years.
- 40% of organizations have recently moved, or plan to move in the next year or so, from a traditional RM view to a much wider IG view. 33% are still working in classic RM mode, including 18% who are still taking a mostly paper-records view.
- The three biggest benefits from good information governance are reduction in storage costs, exploiting and sharing knowledge resources, and faster response to events and inquiries. Users are also becoming more aware of the need to support big data analytics.
- Getting senior level endorsement and involvement is the biggest issue in creating an IG policy. Then enforcement once the policy has been agreed upon.
- Only 10% have an IG policy in place that is respected and enforced – 21% have a policy in place but it is mostly ignored. For 55% the IG policy is a work-in-progress.

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- Of those who have information governance policies, only 19% regularly audit for compliance. 40% of organizations do not allocate any staff time for IG training, and only 4% specifically update senior management.
- RM policies for email are still very variable. 18% keep everything, 16% delete everything, 22% have no policy or strategy. 17% move emails to their ECM/ RM system or a dedicated archive with RM retention functions, but only 5% use automation.
- Use of cloud or SaaS systems for RM is up from 5% to 7% in the past year, with those actively planning up from 11% to 14%. But those saying “unlikely” or “never” is up from 46% to 51%.
- On the whole, users are likely to increase spend on all aspects of IG in the next 12 months, in particular IG training, email archive, search, RM systems and automated tools. Spend on back-file scanning of paper records is set to increase, but outsourced RM, both paper and electronic, is net-neutral.

About Thornton May



Thornton May is Futurist, Executive Director, and Dean of the IT Leadership Academy. His extensive experience researching and consulting on the role and behaviors of boards of directors and "C"-level executives in creating value with information technology has won him an unquestioned place on the short list of serious thinkers on this topic. Thornton combines a scholar's patience for empirical research, a stand-up comic's capacity for pattern recognition, and a second-to-none gift for storytelling to the information technology management problems facing executives.

Thornton has established a reputation for innovation in time-compressed, collaborative problem solving pioneering the Lyceum (an intense learning experience designed to keep "C"-level executives abreast of emerging technology trends); the Directors' Institute (a forum for Board members to increase their awareness of technology management issues); and the Controller's Institute (arena for European Chief Financial Officers to fine-tune processes associated with making technology investments). Thornton designs the curriculum that enables the mental models that allow organizations to outperform competitors, delight customers, and extract maximum value from tools and suppliers.

Thornton's insights have appeared in the Harvard Business Review (on IT strategy), The Financial Times (on IT value creation), The Wall Street Journal (on the future of the computer industry), the M.I.T. Sloan Management Review (on the future of marketing), American Demographics (on the evolving demographics of Electronic Commerce), USA Today (on the future of the consumer electronics industry), Business Week (on the future of CEO direct reports), and on National Public Radio (debating the future practice of strategy with Professor Michael Porter). Thornton is a columnist at Computerworld, CIO Decisions and has served as an advisor to the Founding Editors of Fast Company Magazine.

Thornton May

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Follow Thornton on Twitter: [@deanitla](https://twitter.com/deanitla)

About the Research



As the non-profit association dedicated to nurturing, growing, and supporting the information management and social business community, AIIM is proud to provide this research at no charge. In this way, the entire community can leverage the education, thought leadership, and direction provided by our work.

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About AIIM's Executive Leadership Council

In 2012, AIIM formed a think tank to define, discuss and offer directives on today's emerging issues in information management. This think tank is the Executive Leadership Council (ELC).

The ELC brings together top thinkers, high performance practitioners and leaders in information management for two theme-centric summits annually. Each summit creates a shared space for dynamic conversations to determine the role of the information management industry in a new era of business.

Want to Participate?

Details of the 2014 summit themes can be found at www.aiim.org/elc. Should you be interested in learning more about participating in the Executive Leadership Council, please contact Jessica Lombardo at jlombardo@aiim.org

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