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Industry Watch

SharePoint 2013

Clouding the issues

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Process Used and Survey Demographics

While we appreciate the support of these sponsors, we also greatly value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community.

The survey was taken using a web-based tool by 620 individual members of the AIIM community between July 05, and July 31, 2013. Invitations to take the survey were sent via e-mail to a selection of the 80,000 AIIM community members.

Survey demographics can be found in Appendix A. Graphs throughout the report exclude responses from organizations with less than 10 employees, and suppliers of ECM products or services, taking the number of respondents to 538.

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

SharePoint 2013 is the fourth major incarnation of SharePoint in the last 10 years, and as we will see, some organizations find themselves supporting live versions of all four. Although not really its original purpose, SharePoint has had a major impact on the overall reach of document management and ECM compared to the deployment of earlier systems. Certainly, adoption across the “enterprise” has been much stronger for SharePoint than for other products and usage across multiple “content”-types is broader than for many traditional imaging or document systems. It is in the area of “management” that most of the debate has taken place – to what extent can SharePoint solve all of the content management, records management, and social collaboration needs of the enterprise as a whole. The arrival of many additional features in the 2013 version has added a further twist to that debate, particularly regarding the ongoing need for customizations and the use of third-party add-on products.

A major element of the 2013 release is the further alignment of the “365” family of cloud offerings from Microsoft, and yet this brings with it many strategic decisions of on-prem, cloud and hybrid options, and whether they are hosted by Microsoft, or in a private cloud. Integration with other enterprise systems and third party add-ons may also be disrupted by a move to cloud, but on the other hand, integration with Outlook, Exchange and Lync might be easier.

In this report, we look at the adoption rates and roll-out status for SharePoint as an ECM/DM system, the ongoing issues of user adoption, and overall project success – or otherwise. We measure the adoption of SharePoint 2013 and the difficulties that users report with their upgrades and migrations. We study the impact of the new 2013 features, particularly on third party add-on products that have previously been used to fill in gaps in security, governance, search and social capability. We look at the take up of the 365 product family, and the issues that cloud presents for SharePoint users. Finally, we measure spending plans for licenses, services and add-on products.

Key Findings

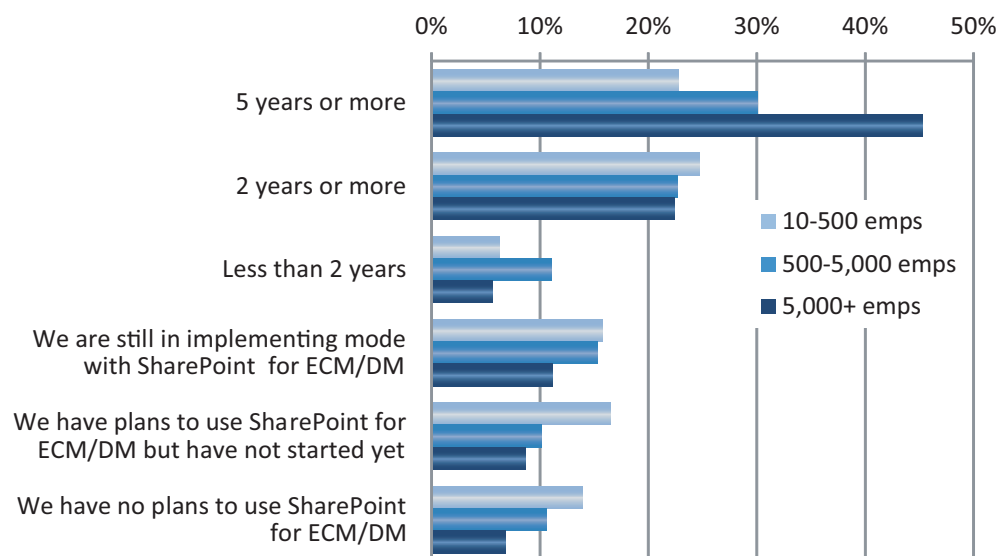
- 57% of responding organizations use SharePoint for ECM/DM, 31% consider it to be their main or only (10%) ECM/DM system. 28% only use SharePoint for collaboration sites and/or intranet.
- 33% are struggling with their SharePoint implementation, and for a further 28%, progress has stalled. 40% are moving forward but only 6% describe it as a “great success”.
- 22% sought no external advice or training. Only 28% took external training, and only 17% used specialist ECM consultants. Most relied on general IT consultants or channel resellers.
- The biggest on-going issues are user adoption, extending the business scope, and governance. Achieving uniformity of classification and metadata is also a big issue.
- 38% are supporting two or more live versions. 21% of large organizations are supporting three or more. Most respondents struggle with the upgrade process – generally considered more of a migration than an upgrade.
- 45% plan to be on SharePoint 2013 by mid 2014. Improved search and navigation is deemed the most useful new feature. Also welcomed are closer integration with Outlook, Exchange and Lync, better mobile device support, and improved retention management.
- Despite improvements in the standard feature set, 67% still see third-party products as important. There is still strong interest in third-party add-in products, particularly system monitoring, BPM, storage management, metadata management, and records management.
- Migration tools, unified data interfaces, and scanning and capture, are the most popular auxiliary products. Auto-classification, content analytics and digital signatures are of growing interest.
- In 49% of organizations, the current driving force is the IT Department. Only 34% are business-driven, including 14% with a multi-departmental steering committee.
- Only 18% are using standard vanilla product. 30% are using somewhat customized versions. Most (53%) are using a standard version with limited customization and/or third-party add-ons.

- 9% of smaller organizations plan to move all of their SharePoint content to the 365 cloud, compared to 2% of mid-sized and 3% of largest. 29% overall are looking to a hybrid cloud, but half of these will use a third-party or private cloud, not 365. 24% are not going to cloud, and 43% are undecided.
- 20% are currently using Exchange 365, but only 8% are using SharePoint 365. 7% are using Office 365 (as web apps).
- 23% still have big issues with governance and user-security in SharePoint (rising to 30% of large organizations). 35% feel that considerable improvements have now been made.
- 45% are prepared to use SharePoint for records management, although 16% of these still need customization or third-party add-ins. 11% of smaller organizations and 24% of large ones feel SharePoint still can't meet their needs, as well as 21% who are already using dedicated RM systems (mostly not linked to SharePoint).
- There is no sign of reduced spending around SharePoint, with internal development, system integration, and training showing strong growth. Most third-party add-on products show a substantial net increase in spend over the next 12 months.

SharePoint in the Enterprise

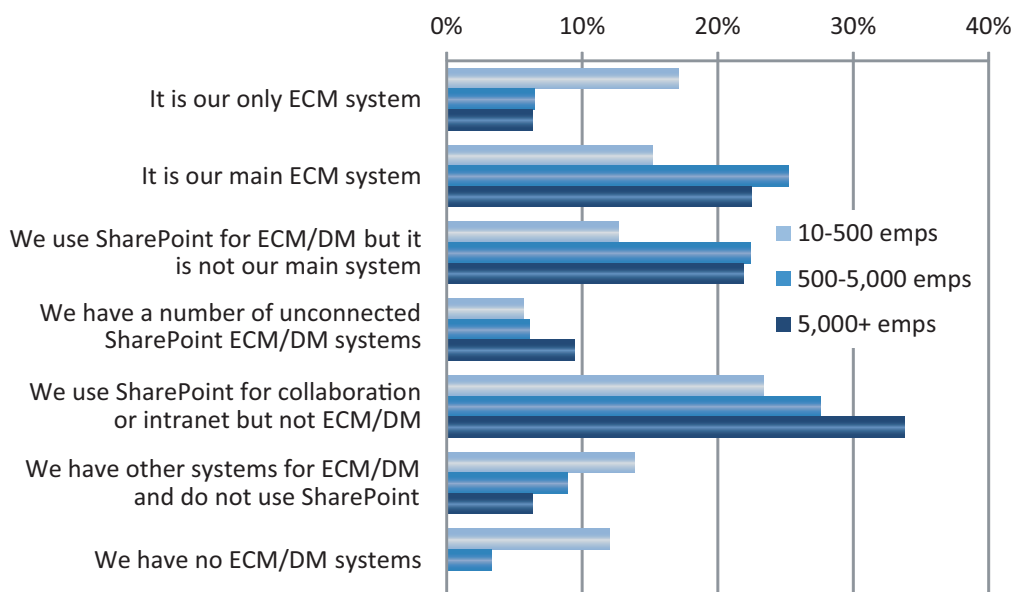
Much debate has always surrounded the availability of SharePoint within the enterprise compared with its actual usage, and beyond that, how many are using it as a collaboration or intranet platform compared to those storing quantities of content and using it as an ECM or document management system. In the first question of our survey, we specifically asked how long SharePoint has been in use as an ECM or DM system. What we can see is that larger organizations were much earlier adopters, with many now having five or more years of experience invested in the product. Small and mid-sized organizations are now catching up. This probably reflects a growing acknowledgment of the general need for ECM in smaller businesses over the past few years. Ironically, as smaller organizations are moving to adopt SharePoint for ECM/DM, SharePoint itself has become more capable, but also much more complex.

Figure 1: How long have you been using SharePoint as an ECM (Enterprise Content Management) or DM (Document Management) system in your organization? (N=535)



As a further aspect of the adoption of ECM in general, larger and mid-sized organizations are much more likely to have pre-existing ECM systems, whereas smaller organizations are three times more likely to have SharePoint as their only ECM system. Having said that, 57% overall use SharePoint for ECM/DM (up from 48% in our 2012 survey) and 31% overall consider SharePoint to be their main or only ECM system (up from 27% in 2012).

Figure 2: How would you describe the use of SharePoint as an ECM/DM system across your organization? (N=532)



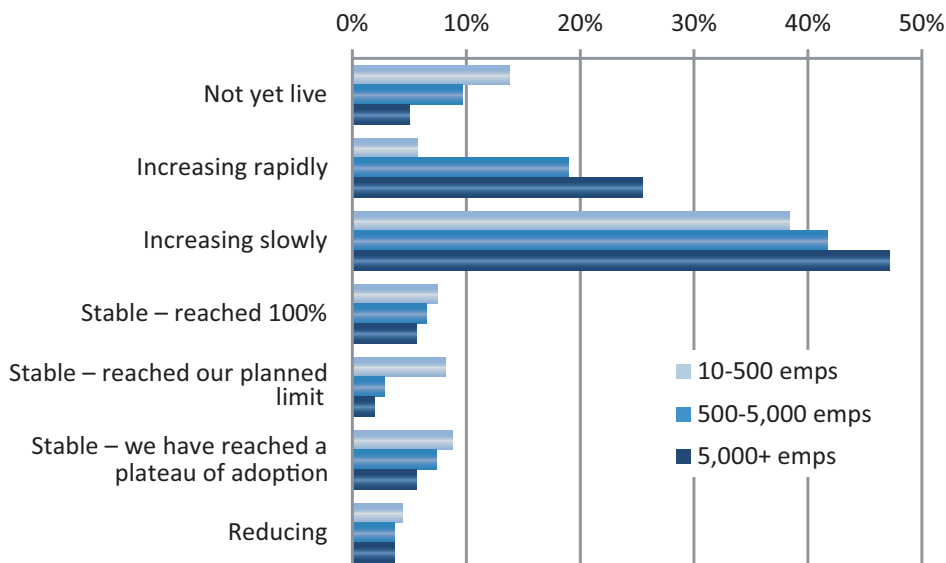
Reach and Usage

Half of the organizations (51%) surveyed here have near universal access to SharePoint (90+% of their staff). 70% have rolled out SharePoint to at least half of their staff. This is quite consistent across different sizes of organization, with just a slight lag for mid-sized businesses (44% universal access). Comparing regions indicates no real difference between North America and Europe.

When it comes to active usage, 57% of organizations report that half or more of those with access are active users, i.e., accessing content at least once or twice a week, but there is a long tail of under-use, with 26% reporting that only one in five of those with access are active users. Even amongst those who have near universal roll out, only a third report that 80% or more of their staff are active users. This probably says as much about adoption of ECM in general as it does about SharePoint. In our recent “ECM at the Crossroads”¹ report, file shares are still deemed the repository of choice for work-in-progress files in 61% of organizations.

Another characteristic of SharePoint roll-outs (Fig 3) is that, despite being mostly longer term users, larger organizations are still more likely to be adding users at a pace. This needs to be compared with the success of the overall deployment indicated in the next section, along with the fact that only 11% report a plateaued or reducing number of active users,.

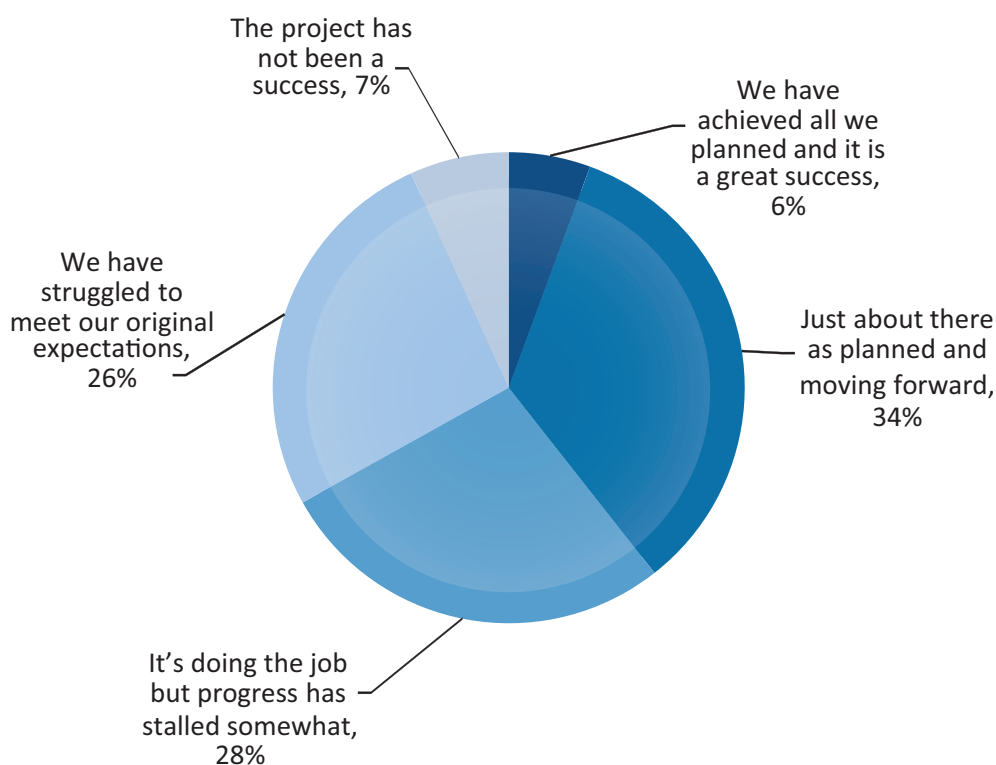
Figure 3: How is the proportion of office staff actively using SharePoint changing? (N=338)



Scope of Success and Ongoing Issues

It is an unfortunate characteristic of most enterprise system deployments that expectations start very high but it takes several years before the project can really be deemed a success. SharePoint is no exception. 68% of respondents feel that it is doing the job for them, but many are seeing a shortfall against original hopes. It is a very broad platform and given the somewhat unplanned nature of its adoption in most businesses, and the more limited experience of content management compared to transactional systems in most IT departments, it is not wholly surprising that 61% of our respondents reported that expectations have not been met or that progress has stalled. Perhaps more damning is that only 6% would consider their project to be a “great success”, and 7% feel it has been a failure. In bigger organizations, the success rate rises to 10% and failures to 4% - possibly reflecting a “too big to fail” element, but more likely indicating better planning, and certainly better external advice. A one-in-ten success rate is still a very low number.

Figure 4: Thinking about the scope and development of your SharePoint ECM project, how would you describe progress? (N=426)

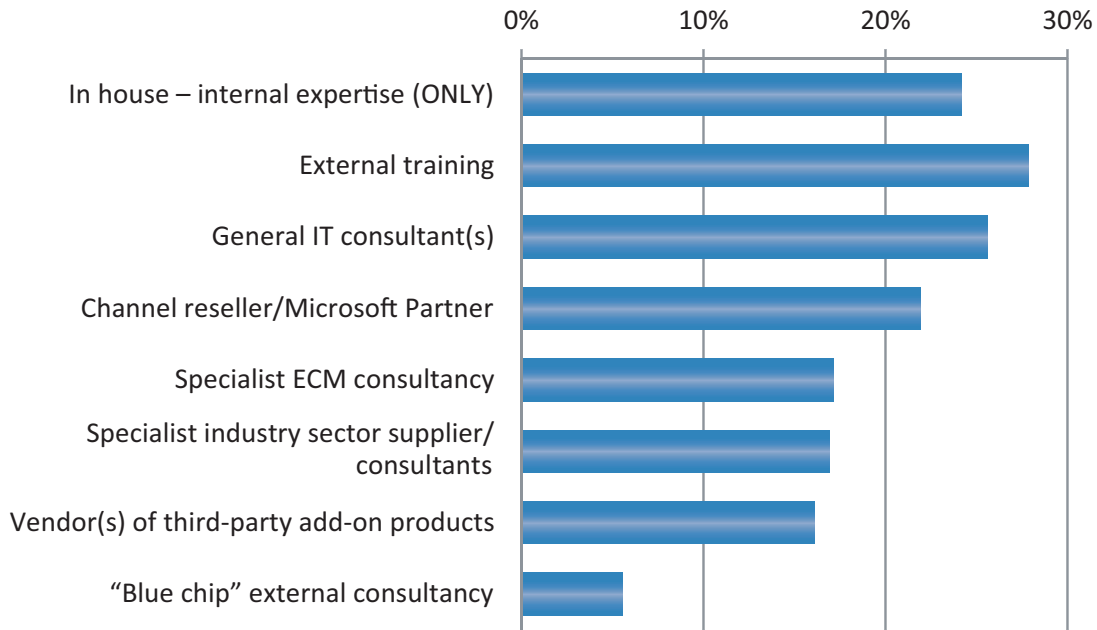


A majority of SharePoint deployments (61%) are stalled, struggling or failing. Only 6% report an unqualified success.

External Help and Advice

Compared to traditional DM and ECM products, SharePoint sells through a channel network, and is likely to be considered part of mainstream IT rather than an area needing specific expertise. Figure 5 shows the potential sources of expertise available, but 24% report relying solely on their own in-house expertise, with a further 26% using general IT consultants - and this is most prevalent amongst the smaller organizations. 28% put staff onto external training courses, although, of course, these may have been technical SharePoint courses rather than ECM best practice courses like those from AIIM. Only 17% report using a specialist ECM consultancy (dropping to 10% of smaller organizations), although correlating Figure 4 and Figure 5 suggests that this can increase the chance of a successful implementation by a factor of two. At 11%, use of “blue chip” external consultants is almost exclusive to large organizations (over 5,000 employees).

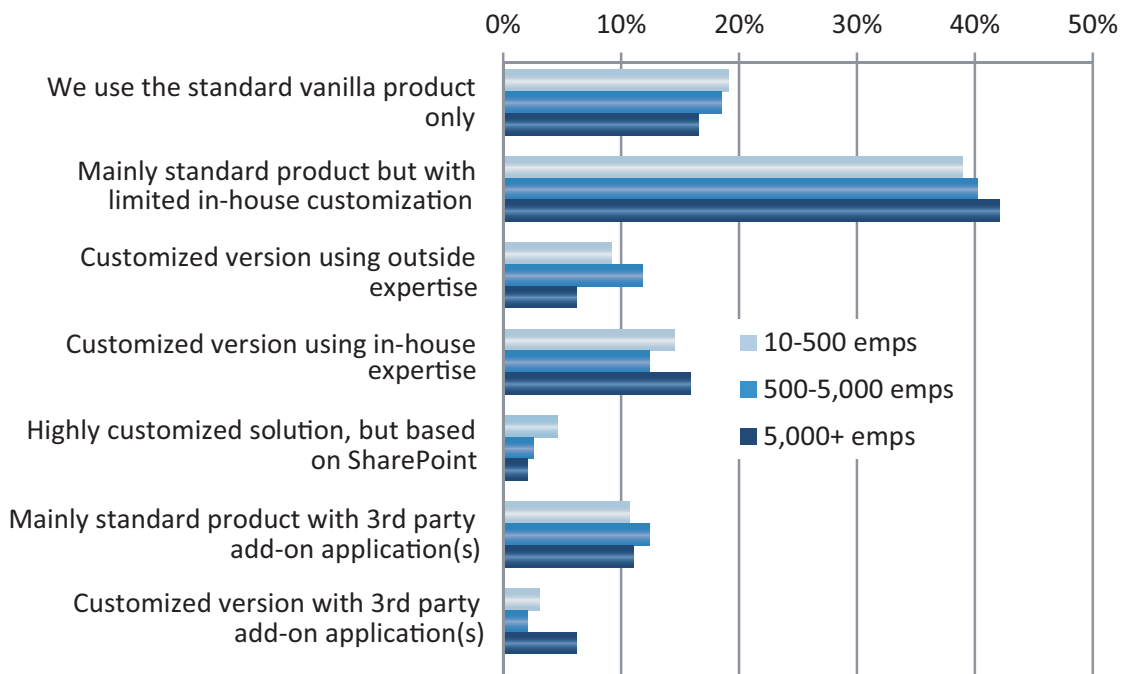
Figure 5: Where has the main help and advice come from for your SharePoint development and roll-out? (Check all that are significant) (N=484, excl.50 N/A)



Degree of Customization

Only 18% of implementations are out-of-the-box or plain vanilla, although 40% have only “limited customization”. Nearly a third (30%) are using customized versions split equally between in-house development and external. Many users reported that they run different customizations for different groups within the business. There is very little difference across company sizes here, which is perhaps a little surprising. Larger organizations are more likely to use in-house customization, but this is balanced by less use of external development. As we will see later, managing the upgrade cycle when the system is heavily customized can cause problems, and we would generally recommend use of add-on products or productized customizations where possible, as the pressure will then be on the third-party supplier to keep in step with each new version of SharePoint as it comes out.

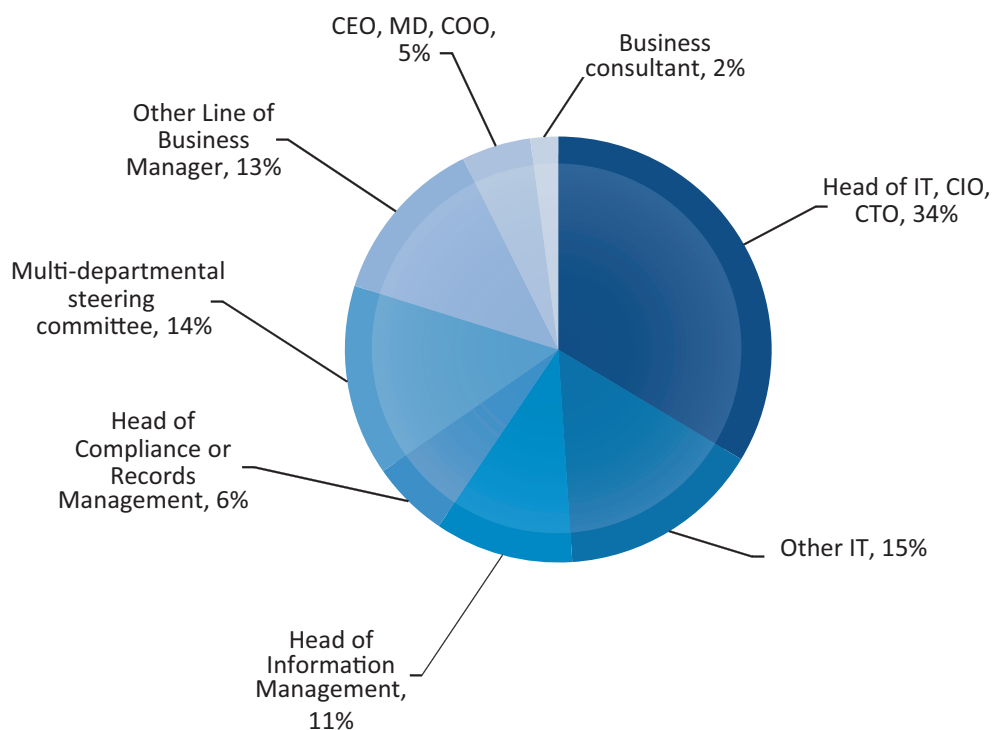
Figure 6: How would best describe your current SharePoint implementation? (N=470 excl. 61 N/A)



Driving Force

Given the earlier figure for stalled or incomplete deployments, we need to ask who in the organization is currently responsible for driving the system forward. 34% are business-driven, including 14% with a multi-departmental steering committee, but given the overall levels of maturity we saw earlier, it is disappointing that 49% are still driven largely by the IT Department. Correlating Figure 4 and Figure 7 shows a 30% higher chance of success for those organizations that have a multi-departmental steering committee, something we consider to be important.

Figure 7: Who would you say is the current driving force in your organization for moving SharePoint forward and extending its scope? (N=476, excl. 58 N/A)

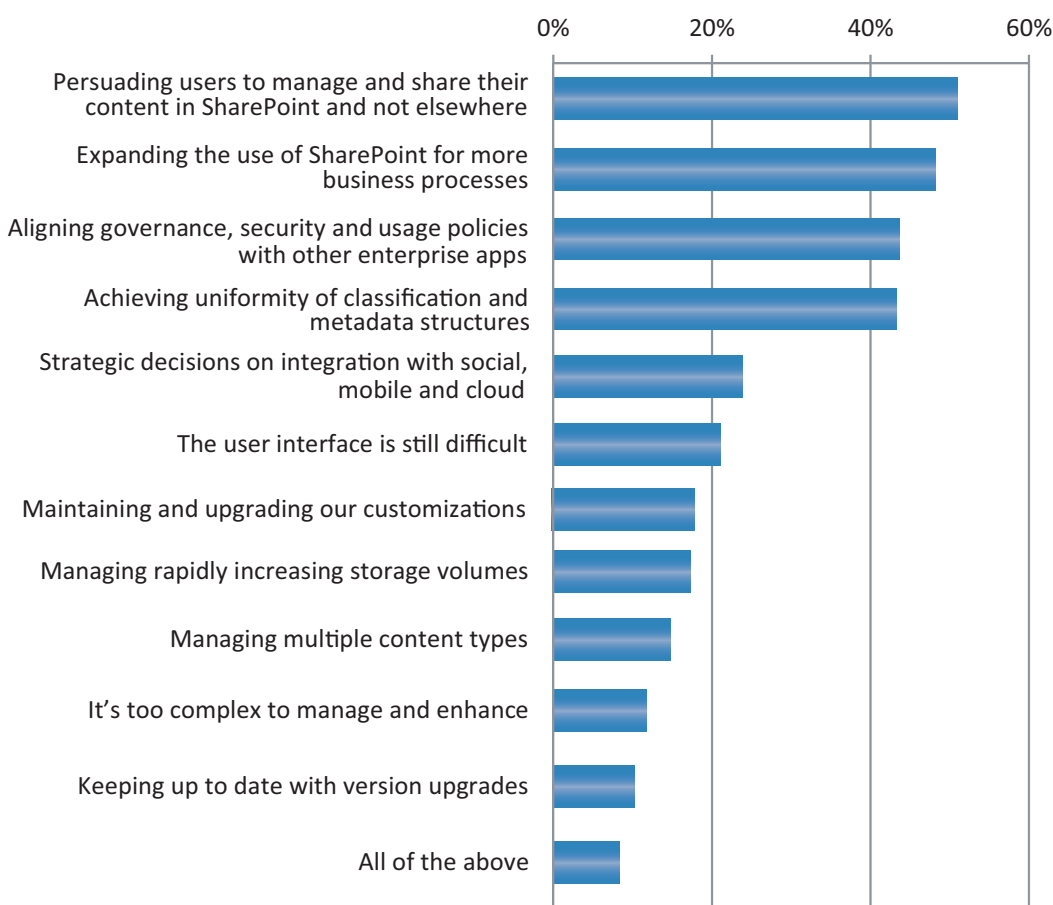


Ongoing Issues

To complete this picture of the installed SharePoint base, we can see that persuading users to make regular use of it is the number one issue, but that persuading business managers to make more use of it for business processes is number two. Then come the two long-running problems, governance and classification consistency.

Even those organizations that set out with a firm strategy for SharePoint are now having to make further decisions on social, mobile and cloud, and we will see later that cloud does not necessarily mean SharePoint 365.

Figure 8: What are the biggest ongoing issues for SharePoint in your organization? (Max FOUR) (N=492)

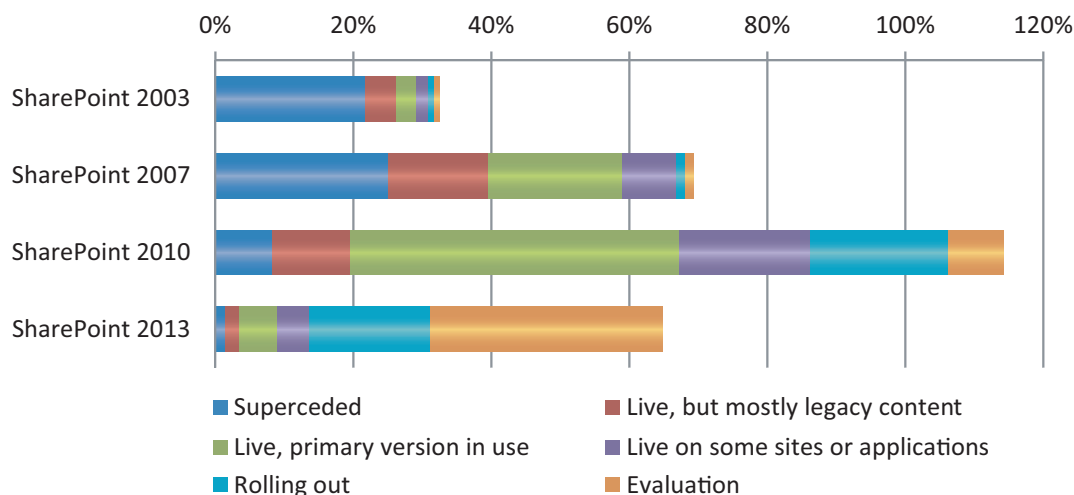


In most organizations, SharePoint is still an IT-driven platform, and this is reflected in high levels of customization, reluctant user take-up, and a limited spread of business processes.

Versions and Plans

SharePoint 2010 is the most popular primary live version, although there are still plenty of 2007 users, and more people are still rolling out SharePoint 2010 (20%) than are rolling out SharePoint 2013 (17%). SharePoint 2013 was launched (somewhat gradually) at the start of the year, and is largely in evaluation mode for most organizations, although 27% already have some live usage as at the date of this survey (July 2013). There is little difference across company sizes or regions. Figure 9 illustrates the current usage for each version (reading horizontally along the individual bars, with some double-counting).

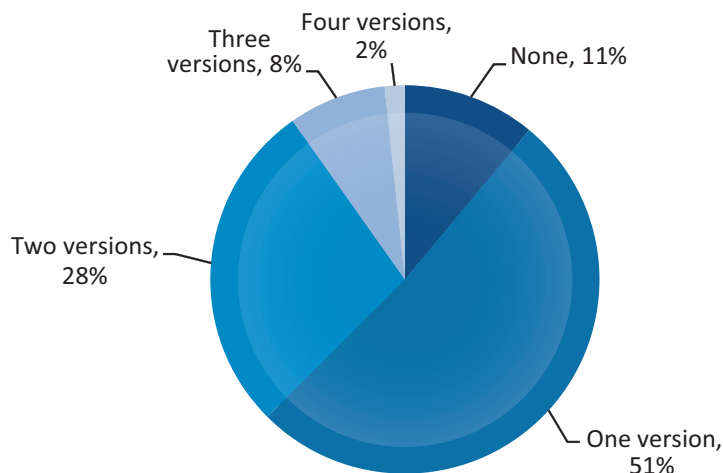
Figure 9: What is the status of the following SharePoint versions in your organization?
(N=510, answers not exclusive)



Although a three-yearly upgrade cycle may seem perfectly reasonable, it has created support headaches in many organizations. As we will see later, each new version has added some major new functionality, frequently exposing cracks in original roll-outs, and necessitating a re-think, followed by more of a data migration than an upgrade. Much of this arises from the fact that SharePoint is both a platform and an application, and many of the application enhancements have disrupted the platform infrastructure – particularly in the BPM area. There is also the fact that many deployments started out as collaboration systems with little thought for content management, let alone records management.

As a result, in some organizations, earlier versions of SharePoint are relegated to specific applications or dedicated content repositories - but they still need to be supported.

Figure 10: How many live versions of SharePoint are you supporting?
(N=480, excl. 34 Don't know)

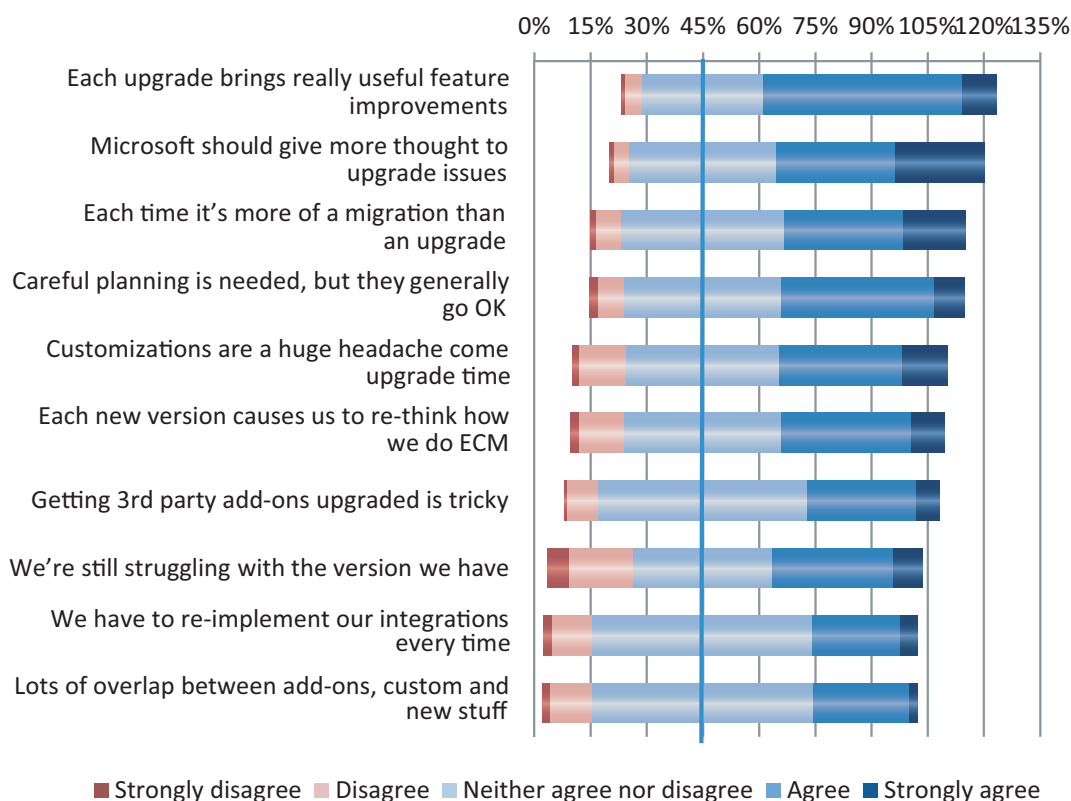


Breaking it down, 25% of the smallest, 40% of mid-sized and 60% of the largest organizations are supporting two or more live versions, with 21% of those supporting three, or even all four versions (3%).

Upgrades

The message that our survey respondents would most like to send to Microsoft is that the feature improvements in each new version are much appreciated, but they would like more thought given to the upgrade process itself. Customizations create the most upgrade headaches compared to 3rd party add-ons, and perhaps surprisingly, re-implementing integrations seems to only be an issue for some – perhaps indicating a poor initial design.

Figure 11: How do you feel about the following statements regarding SharePoint upgrades? (N=478)

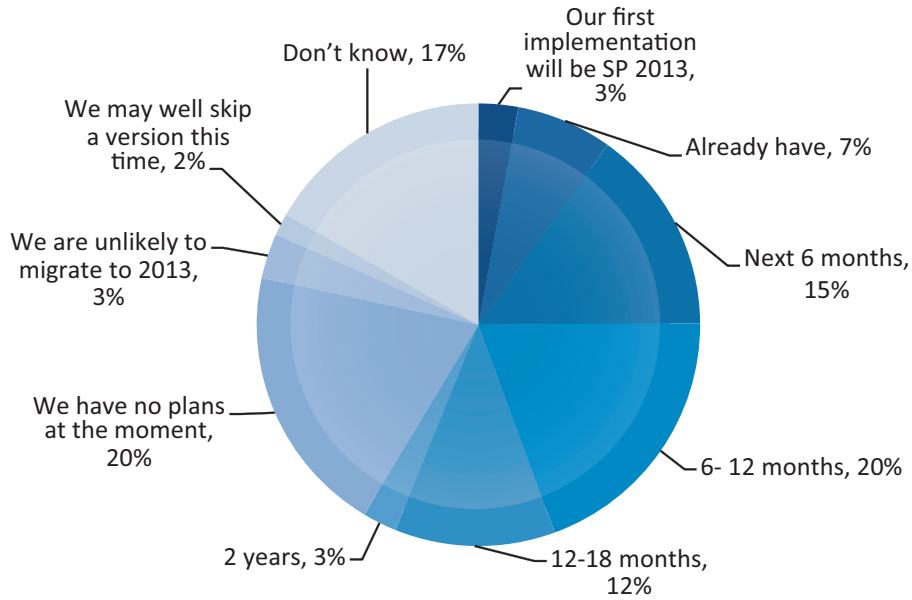


Although set 3 years apart, implementing SharePoint upgrades can be a challenge for many organizations, especially those with high levels of in-house customization, or where initial planning for content governance was lacking. There is a strongly held view that Microsoft could do more to ease this situation.

2013 Features and Plans

Despite a slow start, 45% plan to migrate to SharePoint 2013 by mid next year (2014), led by smaller organizations (49%) compared to the largest (40%).

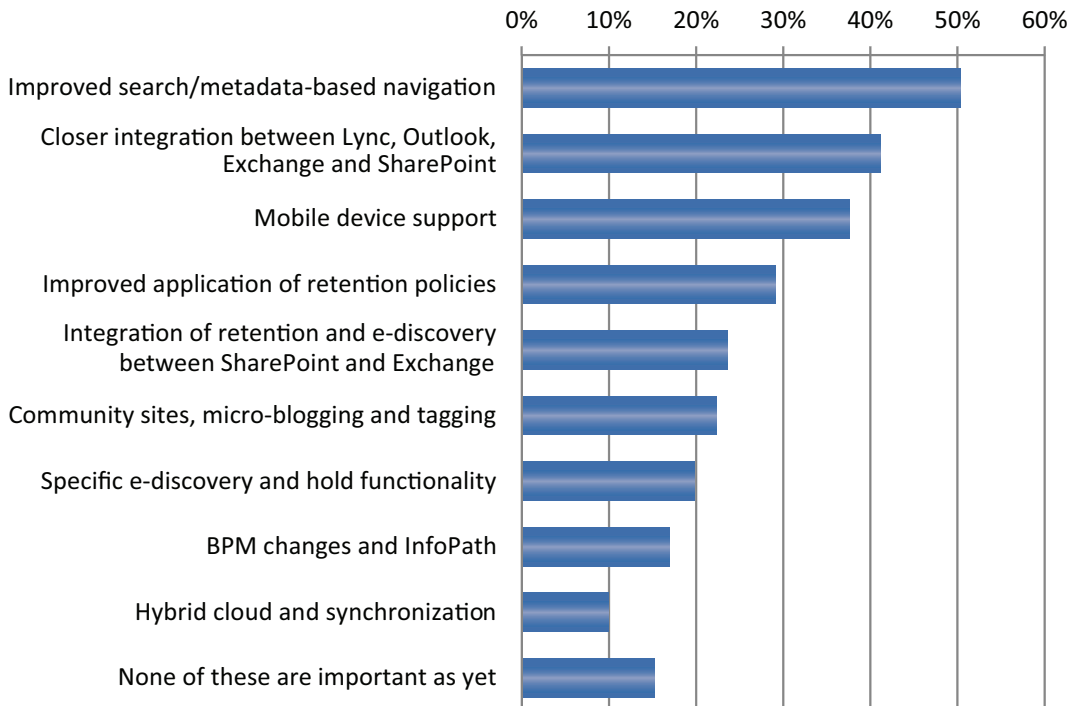
Figure 12: When do you plan to migrate to SP 2013? (N=514)



When it comes to the new features in SharePoint 2013, many respondents (44%) admitted they have yet to study them in detail. Improved search and metadata-based navigation seems to be the most popular feature, matching that available on many e-commerce websites these days. Evidence of loyalty to the “Microsoft stack” shows up in the popularity of the closer integration offered between Lync, Outlook, Exchange and SharePoint.

Then comes mobile device support. An “official” mobile client for SharePoint has always been an important missing element and even now the offering is more of an enhanced browser than a true mobile app. This leaves considerable scope for third-party applications, either as SharePoint-specific access products, or more capable ECM-interface and content-creation products. Security is, of course, an important consideration here.

Figure 13: Which SharePoint 2013 features are likely to be the most useful to your organization? (Max THREE) (N=495)



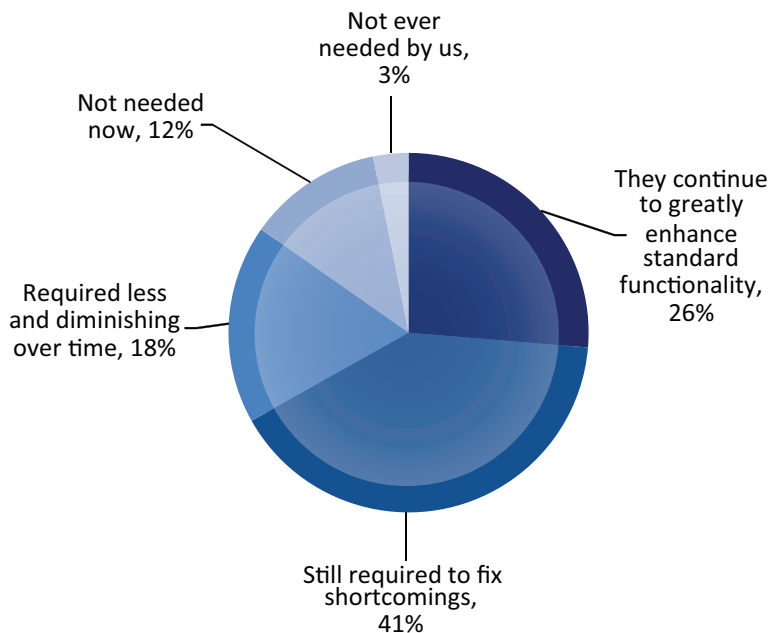
The next most popular group of applications are in the records management realm. Better application of retention policies is welcome, and is the only way that some organizations are going to limit their explosive server growth. SharePoint and Exchange have always existed in different divisions of Microsoft, and as a result, there has never been a practical solution to the thorny issues of email management, archive, retention and e-discovery. E-discovery has been given an increased focus in the 2013 version, and in particular, the way legal holds are managed.

Records management in SharePoint per se has always been the subject of debate, and we will return to this later.

Requirements for add-ons

Microsoft has always considered SharePoint to be a platform rather than an application, and has encouraged a community of developers to extend and enhance the capabilities. Those joining the SharePoint community as third-party developers have always run the risk that their niche set of add-on features will at some point be absorbed into the standard product set. This fourth incarnation of the host product was always likely to create the biggest threat. However, 67% of our end-user respondents consider that 3rd party add-ons still offer important capabilities, either to enhance standard functionalities or (by their perception) to fix shortcomings.

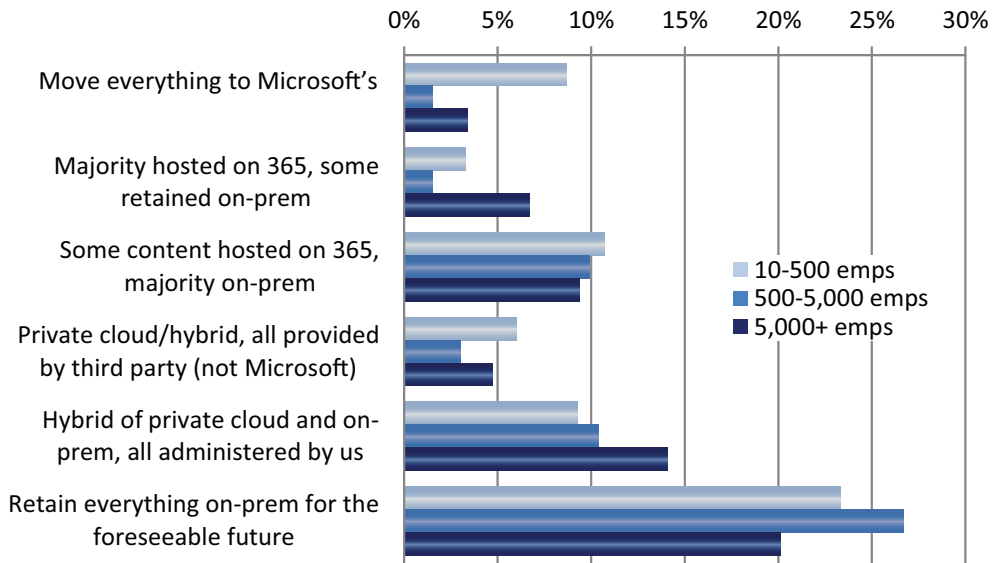
Figure 14: As SharePoint continues to expand its feature set, what are your views on the use of 3rd party add-ons? (N=504)



Cloud Strategies

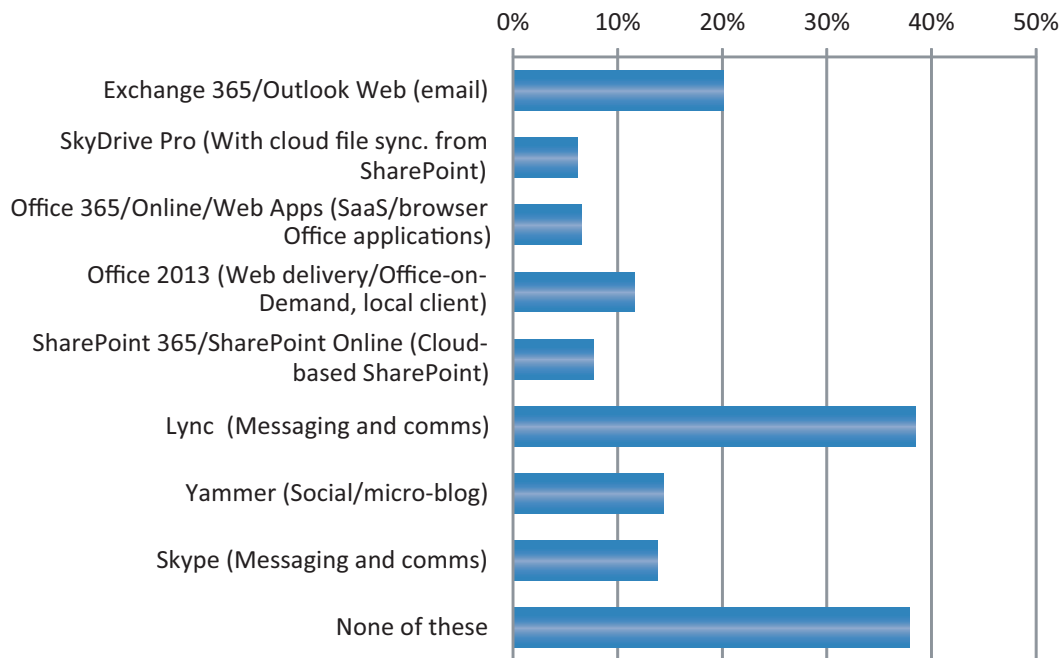
As we hinted in the title of this report, SharePoint 2013 has always been projected as the first release under Microsoft's all-out cloud strategy using the "Office 365" branding. However, the range of product and platform offerings is somewhat confusing, and can easily create misleading research results. The first point to note is that a significant 43% have no plans for storing SharePoint content in the cloud as yet, or are undecided about their cloud strategy, and 24% have an agreed plan to retain everything on-premise. This leaves just a third (33%) with positive plans for cloud, of whom almost all (29%) are planning a hybrid solution. The only significant interest in a wholesale move to a Microsoft-hosted cloud for their content is for 9% of the smallest organizations. However, the most popular platforms for hybrid solutions is to use a private corporate cloud (11%) or a third party private cloud (4%) rather than a hybrid Microsoft 365 cloud (14%). Even where the 365 cloud is used, it is much more likely to be a "thin hybrid" with the majority of content retained on-premise.

Figure 15: What are your plans for SharePoint in the cloud? (N=501, inc. 215 "Undecided/No Plans")



When it comes to the wider offerings of the 365 family (plus Yammer and Skype), 62% of our responding organizations are currently using at least one cloud-based Microsoft product, although it is most likely to be Lync (39%) or Exchange 365 web mail (20%) rather than SharePoint 365 (8%). Only 7% are using Office 365 as a fully SaaS application, as opposed to web-delivery/on-demand.

Figure 16: Which of the following applications has your organization adopted? (N=493)

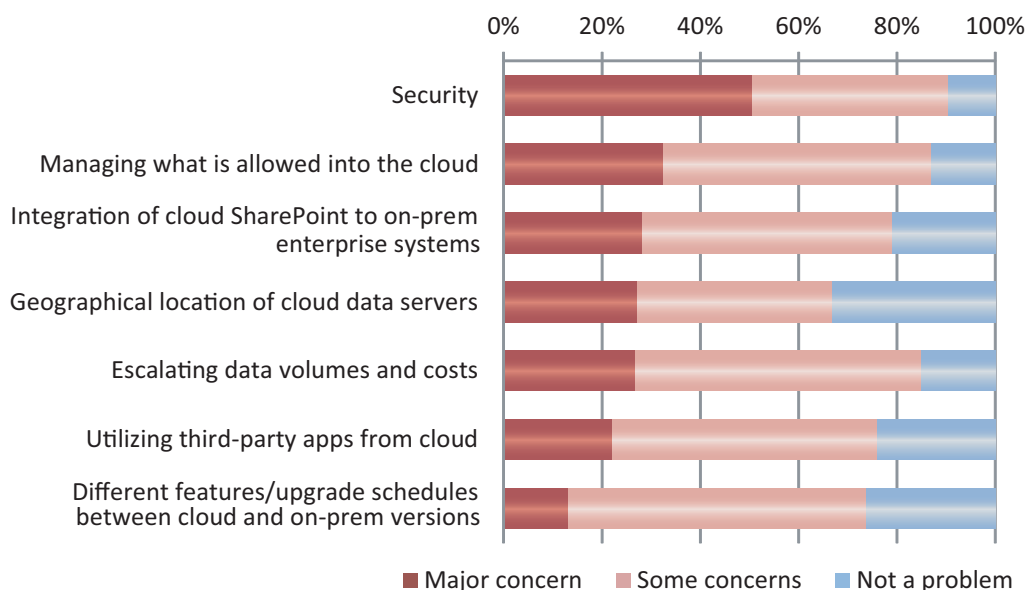


We did ask if the experience of using a cloud-based Microsoft product has influenced the organization as a whole regarding cloud-based services. Whilst there was some re-assurance to be found on availability and mobile access (40%), speed of response was ambivalent (22% OK, 27% disappointed), and 33% felt they are not seeing any cost benefit or reduction in IT support.

Cloud Issues

Inevitably, security is the biggest issue for cloud even amongst those who plan to use it, and when using a hybrid solution, there is the issue of how to manage what content is allowed into the cloud. Integrating a cloud SharePoint system to on-prem enterprise or transactional systems is also an issue for many BPM applications. Geographical location of servers is also a concern, particularly outside of the US.

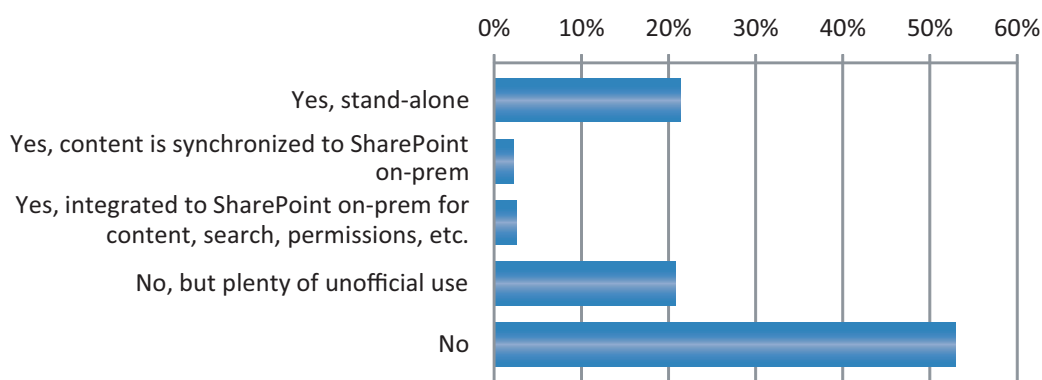
Figure 17: How significant will/are the following issues for you with using a cloud or hybrid solution for SharePoint? (N=170 planning or using cloud)



One key issue with SharePoint 365 is that upgrades will be continuous in the cloud version, and to an extent unavoidable, whereas the timing of updates to the on-premise version is more of a user choice. This, along with customization issues, is likely to be driving the popularity of SharePoint hosted in a private cloud. Technically, this is relatively straightforward to do as it is an inherently browser-based solution, compared to some more traditional content management products.

An alternative mechanism for a hybrid cloud solution, with easy access for those outside the firewall, is a cloud-based file-sharing or collaboration application with synchronization back to an on-premise SharePoint installation. We can see in Figure 18 that stand-alone file-sharing applications are popular, although they are as likely to be in unofficial use as officially sanctioned. Microsoft have moved to address this need with SkyDrive Pro, but somewhat too late given the popularity of Box, and to an extent, Dropbox. However, only 5% of organizations using cloud-share products like these have any degree of synchronization or integration back to on-premise SharePoint. It is, of course, early days here, firstly to adopt a product for corporate use, and then to link it back to on-premise ECM of whatever flavor.

Figure 18: Do you currently have any “official” cloud-based file-sharing or collaboration applications outside of SharePoint? (N=499)



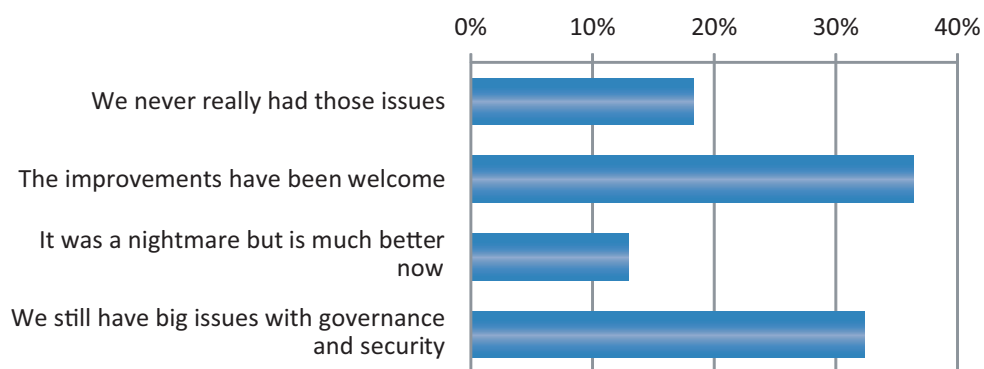
The majority of SharePoint user-organizations are still very cautious about cloud, and a hybrid model is the most popular compromise to overcome security and integration concerns. Even then, most prefer to use their own private cloud rather than Microsoft's 365 platform when it comes to SharePoint – compared to using the more popular email or social applications on 365.

Governance

Ever since the early days of unfettered team-sites and unrestricted metadata, SharePoint has had a poor reputation for its security and information governance. In particular its records management functions have in the past been criticized as inadequate for most organizations. However, each new release has added additional security, governance and RM functionality, and the SharePoint 2013 release has extended that to cover improved retention management and more comprehensive e-discovery.

Generally, 49% appreciate the improvements that have been made in this area, but 32% still have big issues with governance and security. It should be noted that 28% of respondents posted a Don't Know, and there were numerous comments that technology alone cannot secure good governance in the absence of suitable policies and a strong corporate will.

Figure 19: To what extent do you feel that the governance and user-security issues of early SharePoint versions have gone away? (N=355, excl. 140 don't know)

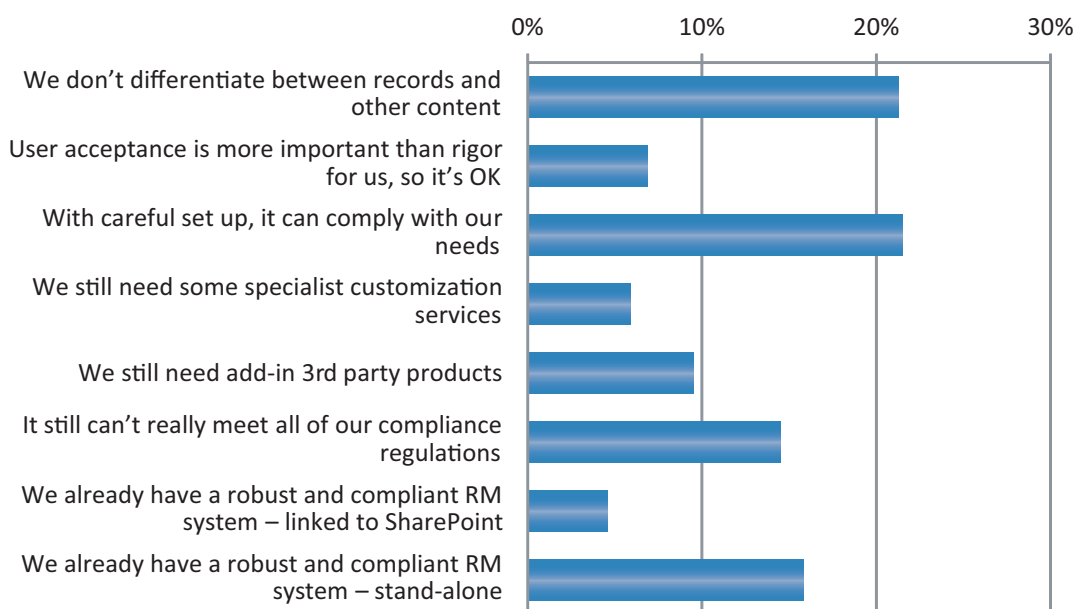


Taking the discussion further, we asked how users feel about using SharePoint 2013 for their records management requirements, and the responses once again paint a more complex picture than many commentators imply.

Firstly, 21% overall do not differentiate between records and other content. This rises to 29% for smaller organizations, but a surprising 18% of mid-sized and largest companies do not designate any of their electronic content as records. 29% overall are prepared to accept SharePoint as it is, including 23% of the largest organizations and 33% of mid-sized. 16% overall still need customization or third party add-ins in order to meet their needs.

This leaves a total of 36% who either feel that SharePoint cannot meet all of their compliance requirements (15% overall, rising to 24% of largest), or they already have a robust and compliant RM system that they prefer to use instead (21%). In this latter case, the RM system is most likely to be stand-alone and not linked to SharePoint.

Figure 20: How do you feel about using SharePoint 2013 for your records management requirements? (N=461)



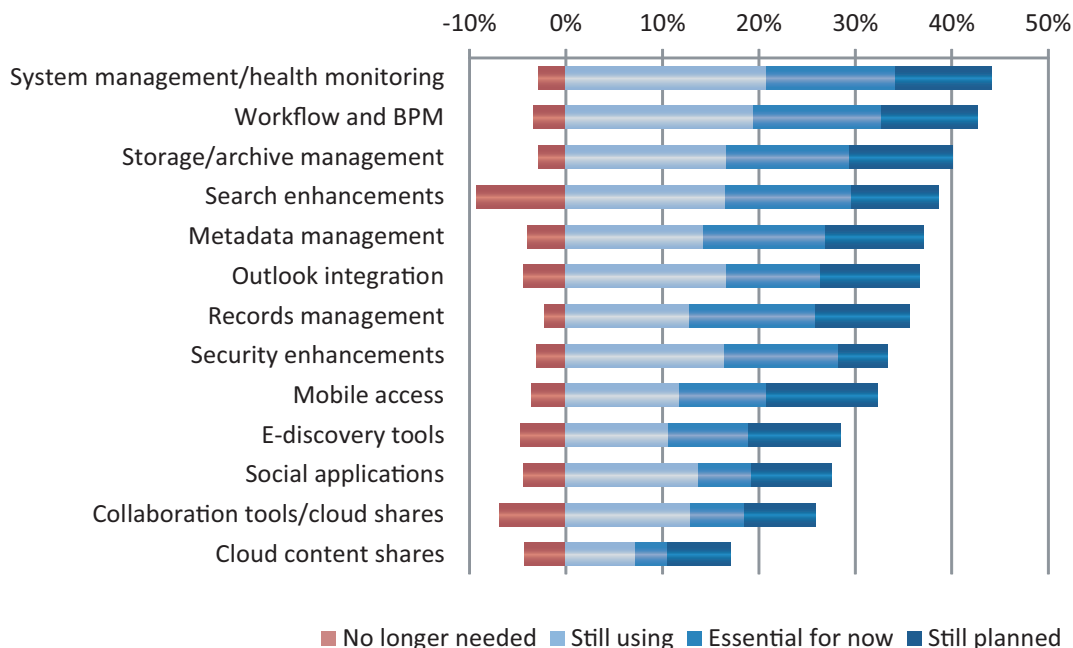
Of those concerned with records keeping, just over half feel that SharePoint can meet their needs, although many of these look to specialist customizations or add-in products to make it work. Around half of the rest (21% overall) already have stand-alone RM systems.

Third-Party Add-On Products

We saw earlier that 67% still see third-party add-on applications as being important. In Figure 21 we focus on products that overlap or supplement native SharePoint functionality, and also measure how many users feel they are no longer needed with the 2013 version. In Figure 22 we look at auxiliary or companion products that boost the overall capability of SharePoint.

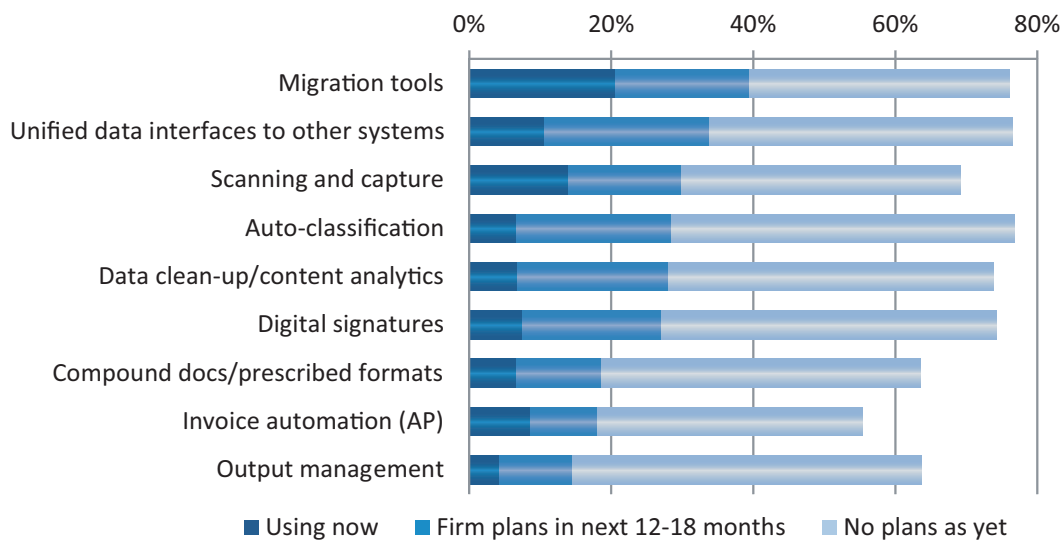
Looking at the add-on products, key 2013 features such as search enhancement and cloud collaboration are seen as making third party additions slightly less necessary, but they are still in very strong demand. Other popular areas are system management and health monitoring, BPM, storage management and metadata tools. Outlook integration is featured in the new release, but our users seem to prefer third-party products – perhaps they are likely to be more mature and function-rich.

Figure 21: How have the last two versions of SharePoint affected your use of third-party add-on products in the following areas? (N=461)



When it comes to products that do not compete with the native functionality, migration tools are widely used now (20%), with the same number planning to acquire them. Unified data interfaces also feature highly, along with the already popular scanning and capture front-ends. When it comes to growth, auto-classification, content analytics and digital signatures are all set to become more widespread, with adoption growing from under 10% to around 30%.

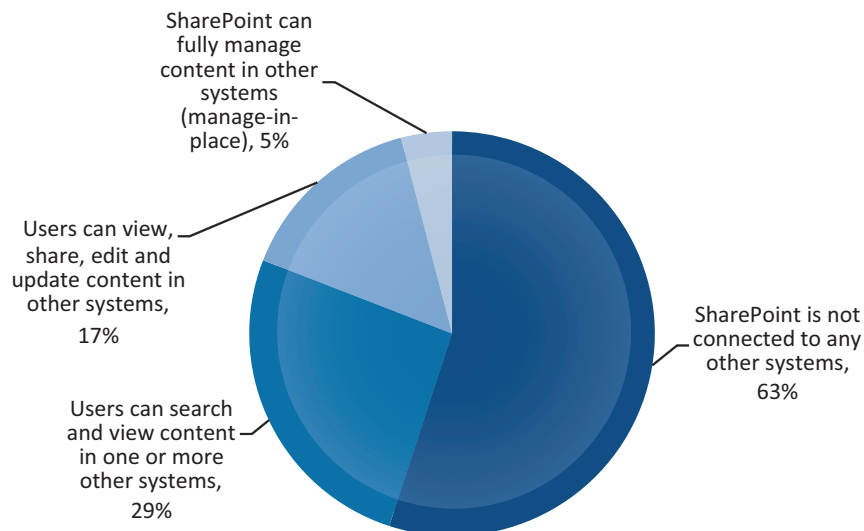
Figure 22: Which of the following auxiliary products for SharePoint have you implemented/plan to implement? (N=465, line length indicates N/A)



Integration and Access

Picking up on the integration element, SharePoint is frequently considered to be the focus of consolidation of content systems, providing an access portal into other content repositories – whether they are other ECM systems, or enterprise systems such as ERP and CRM. This can simply be at the basic level of search and view, or extended to include more of the standard content management functions, and all the way up to full records management. The concept of manage-in-place was extended in the 2010 version to better include other systems, although only 5% have taken this up. SharePoint operates in isolation in 63% of organizations – a missed opportunity to provide a common point of access for all types of corporate information.

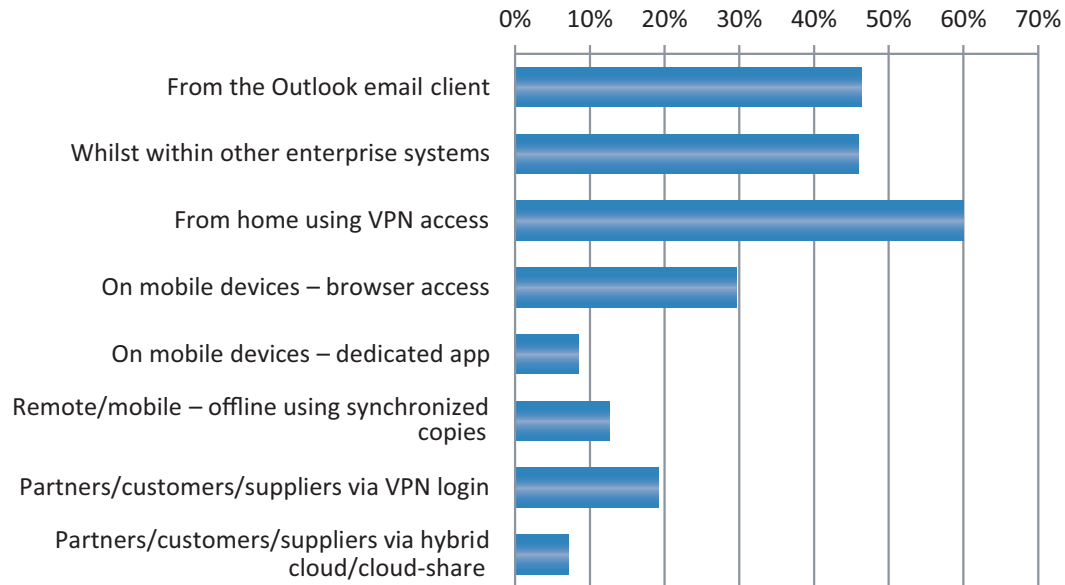
Figure 23: To what extent can your SharePoint users access content stored within other enterprise systems? (N=422)



One of the drivers for utilizing cloud versions of SharePoint is to improve access both across and outside of the corporation, and also onto mobile devices such as tablets and smartphones. We can see in Figure 23 that access is anything but universal in most organizations. Desktop access within the firewall is fairly well covered, including VPN access from home, access from other enterprise systems, and also the popular connection via the Outlook mail client.

However, when it comes to mobile devices, struggling with the standard browser screen is the norm, and even that is only made available to users in 30% of organizations. SharePoint 2013 does have a mobile-sensitive browser mode, but requires the whole organization to be running this version. Only 9% provide a dedicated mobile app, although 13% do allow copies of content to be synchronized for off-line use. The big issue here is creating a secure environment on the mobile device, and Microsoft seems to be leaving it to third parties to implement or incorporate Mobile Data Management alongside SharePoint access. When it comes to connecting third-parties, VPN (19%) is still much more prevalent than hybrid cloud shares (7%), despite its potential risks and support headaches.

Figure 24: To what extent can your SharePoint users access content stored within other enterprise systems? (N=422)

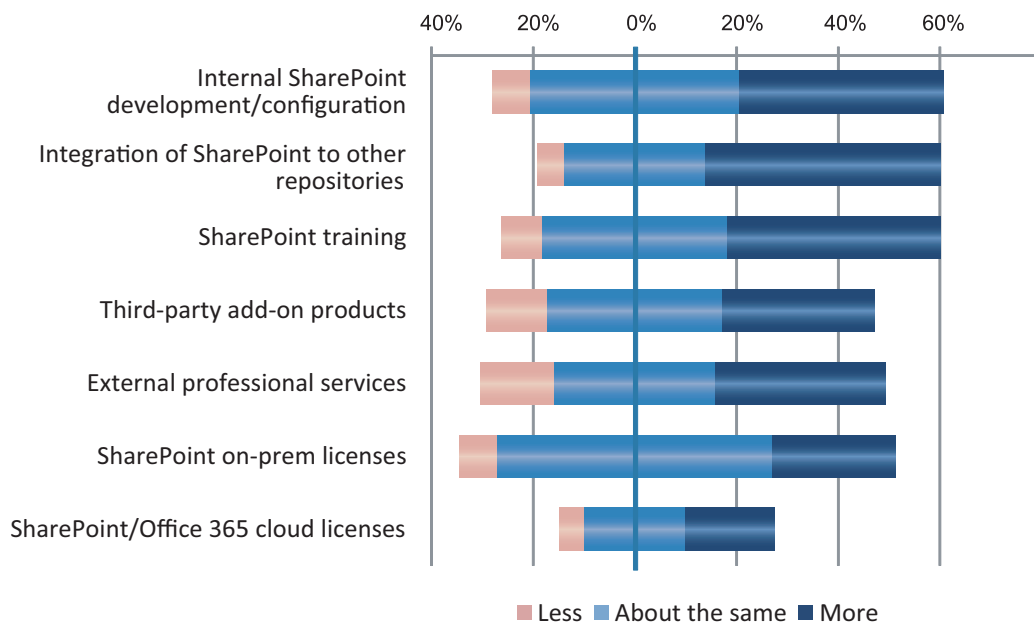


Given its day-one philosophy of browser-only clients, and content-type independence, SharePoint is in something of a bind when it comes to mobile apps for access to content, and even more so for off-line interaction and editing – much to the frustration of many users.

Spend

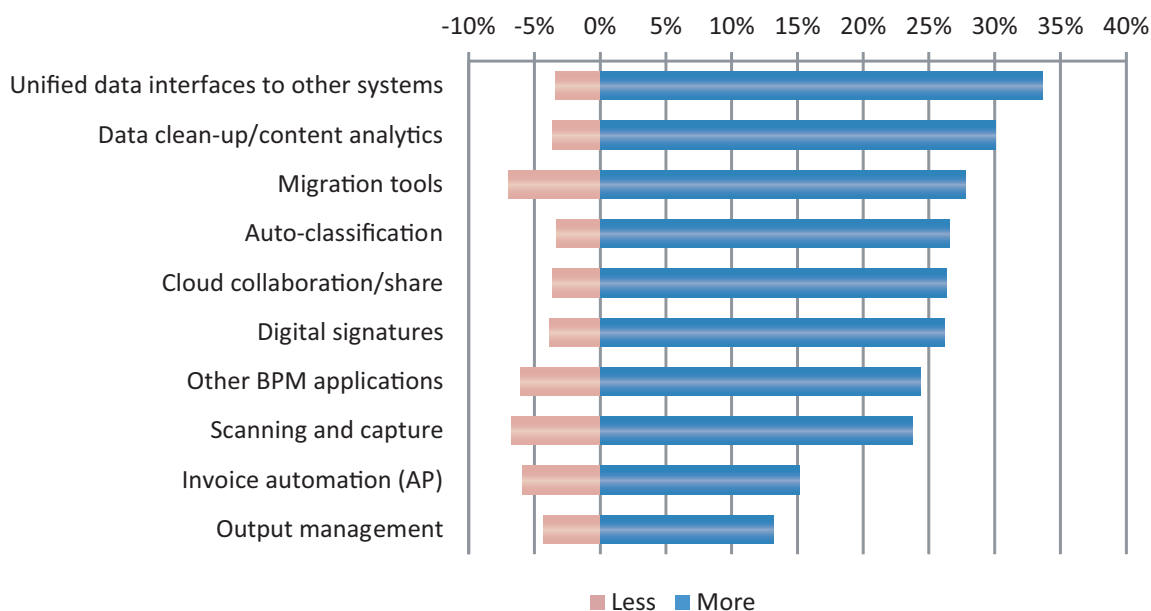
Spend in all SharePoint-related product and service areas remains strong, with particular increases in internal development, integration and training – the latter also being reflected in the expansion of AIIM training topics in this area. External professional services and third-party products also show positive net growth. Perhaps surprisingly, our survey respondents are posting a still-increasing net spend on SharePoint licenses for on-premise systems as well as the new 365 services.

Figure 25: How do you think your organization's SharePoint-related spend in the following areas and applications in the next 12 months will compare with what was actually spent in the last 12 months? (N=461, shorter lines indicate more "we don't spend anything on this" responses)



Much as we saw earlier, when we break down the third-party product spend, data interfaces, content analytics and migration tools are popular candidates for more investment, along with auto-classification, digital signatures and BPM products. Cloud collaboration and sharing applications figure highly for growth, suggesting once again that SharePoint 2013 has not provided a full answer here.

Figure 26: How do you think your organization's spend on the following products in the next 12 months will compare with what was actually spent in the last 12 months?
(N=454, "Same" and "We don't spend anything on this" excluded)



Spending intentions on licenses, services and third-party products are all set for considerable growth, indicating that the SharePoint engine is still firing on all cylinders, and that the SharePoint community is continuing to enhance both the capabilities of the platform, and the sophistication of its deployment.

Conclusion and Recommendations

SharePoint 2013 is headlined for better search, improved linkage to email and social tools, enhanced records management functions, improved mobile capabilities, and full membership of the 365 cloud services family. While all of these improvements are welcomed by our survey respondents, they are much more enthusiastic about search, email integration and better records management than they are about the others, and even then, they are loath to give up the third party add-on products that specialize in these areas. When it comes to cloud, a third of responding organizations plan to make the move, but mostly as a hybrid cloud, and more likely on a private cloud platform rather than using SharePoint 365.

Mobile support and enhanced social capabilities are underplayed, with best-of-breed products being preferred, particularly for building cloud-based content-sharing environments. As a records management tool, Microsoft have never claimed to cover all requirements across all organizations, and there is evidence here that the threshold has moved on with 2013, with some useful additions for retention management and e-discovery. However, for many organizations, a dedicated RM system is still the safest and possibly easiest route, either keeping an existing system, or implementing a new one.

Also coming through strongly is that each new version of SharePoint creates upgrade problems, frequently highlighting data inconsistencies created by the lax information governance policies within the earlier versions. This has further implications for 365 cloud services where users will be more closely tied to Microsoft's own upgrade schedules. Each upgrade also brings more sophisticated services such that external advice and training are even more important for these later versions than they were for the earlier ones.

Although enterprise-wide SharePoint roll-out is now the norm, user take up can be a struggle, and success can be elusive, with many deployments struggling to achieve their original intentions. However, organizations seem prepared to continue investing in core licenses, professional services, and additional add-on products as they pursue the goal of building a capable and comprehensive content and records management system, with SharePoint as the underlying platform.

Recommendations

- If your existing SharePoint deployment is struggling or stalled, do not assume that upgrading to 2013 will fix it. Consider whether the drive to go forward resides just in the IT department or is more of a business project.
- Endeavor to re-ignite progress before moving on to the new version. Consider calling in external help: this may be in the form of external consultants, external training, or third-party add-on suppliers.
- Above all, look at user acceptance of information governance as a concept, and how it is embodied in SharePoint specifically. You may need to re-address policies, and carry out re-training. Consider making it easier for users to comply with policy by using third party products for metadata automation, and providing access through familiar UI's like Outlook.
- Investigate the new features and functions of SharePoint 2013. Take as objective a view as possible. Talk to others in the SharePoint community about their experience. If you don't understand the implications of some of the features call in external help.
- If your current deployment of SharePoint has metadata deficiencies or security inconsistencies, consider using a migration tool to align and fix the data into a "clean" 2013 system. This will give you the best opportunity to correct long-standing issues.
- Using SharePoint 365 as a cloud service, fully integrated with Lync and Exchange 365, and more widely available outside the firewall, is an attractive proposition, but be aware that this may also limit your ability to port your custom applications, and to integrate with other on-premise systems. You may also be locked into the Microsoft upgrade schedule and be compromised on customization compatibility.
- Do not rely on SharePoint 2013 to kick-start your mobile access, content-sharing and social business initiatives. It may suffice, but compare and contrast the offerings from best-of-breed products or integrations. Chances are you could get started now without upgrading to 2013 first.
- The same is true of records management. Don't settle on SharePoint simply because you have it. Consider your needs for secure access, compliance and e-discovery across the business, and include paper records and electronic. Then evaluate SharePoint's capabilities in this area.
- Do not assume an either/or scenario for records management. Your existing system(s), existing suppliers, or your outsource may be able to provide a win-win integration with SharePoint.

References

1. AIIM Industry Watch, "ECM at the Crossroads – key strategy choices for universal content access". April 2013, www.aiim.org/research



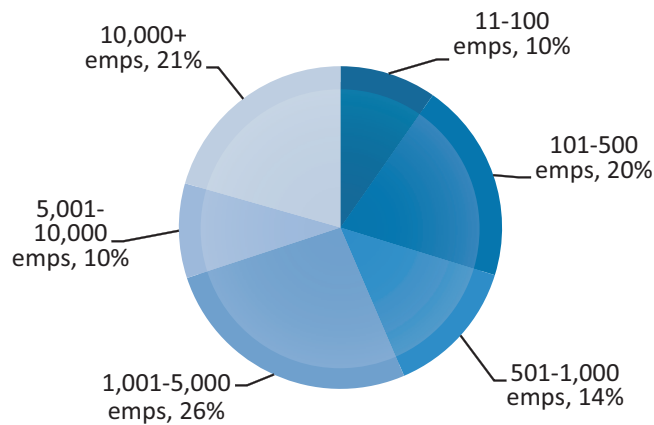
Appendix 1 - Survey Demographics

Survey Background

620 individual members of the AIIM community took the survey between July 05, and July 31, 2013, using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 65,000 AIIM community members.

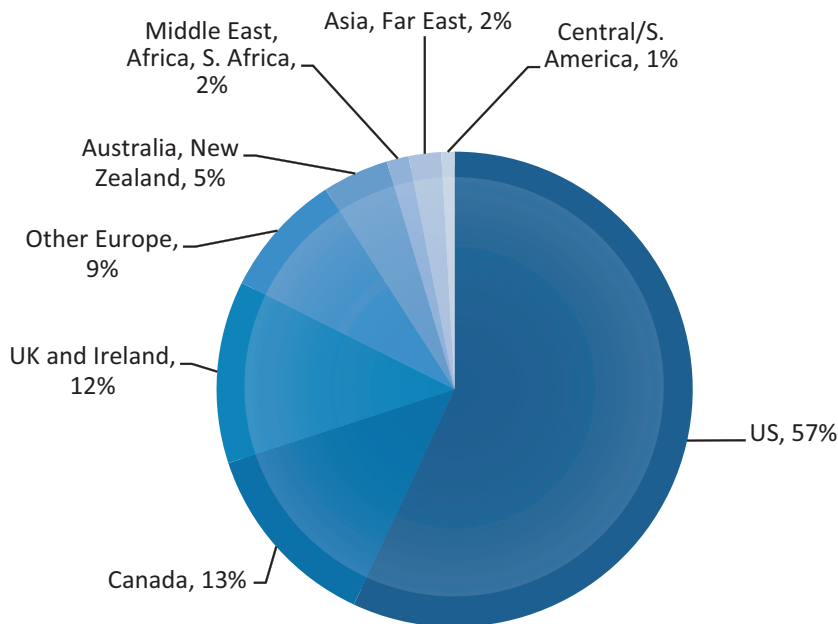
Organizational Size

Survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 31%, with mid-sized organizations of 500 to 5,000 employees at 40%. Small-to-mid sized organizations with 10 to 500 employees constitute 29%. Respondents from organizations with less than 10 employees or from suppliers of ECM products and services have been eliminated from the results.



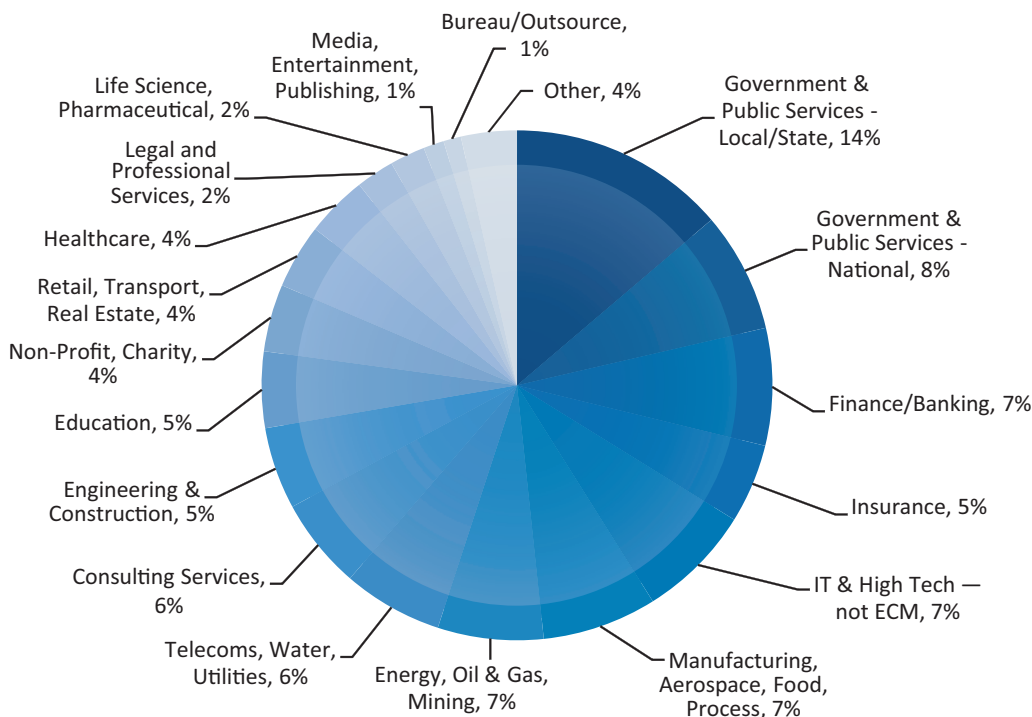
Geography

70% of the participants are based in North America, with most of the remainder (21%) from Europe.



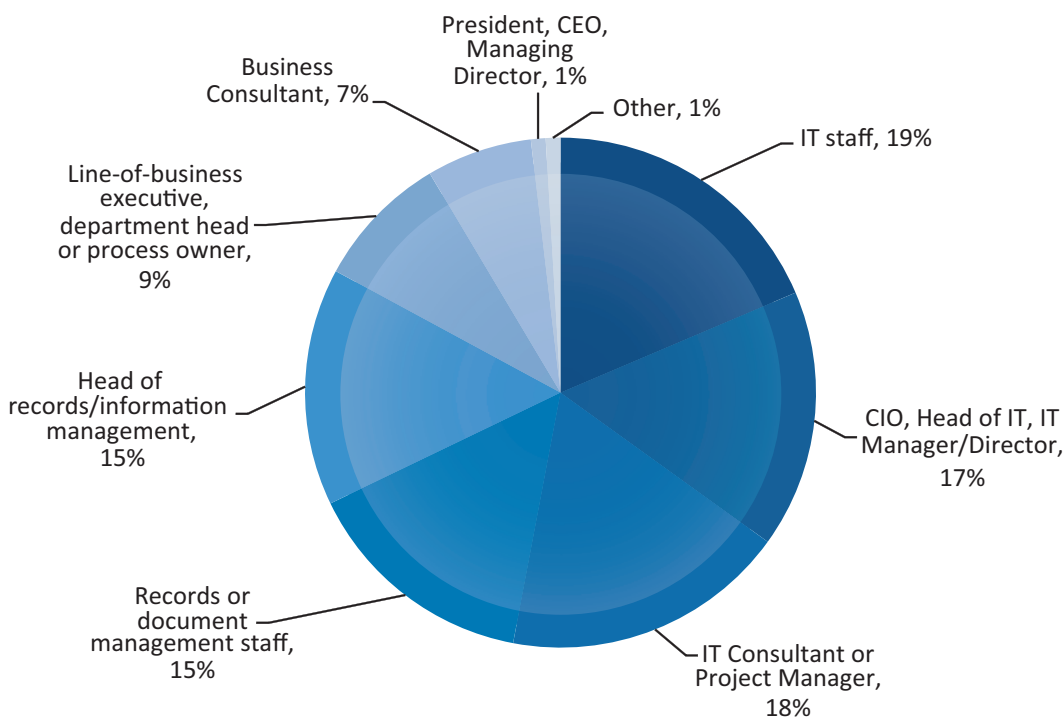
Industry Sector

Local and National Government together make up 22%, Finance, Banking and Insurance represent 12%. The remaining sectors are fairly evenly split. To avoid bias, suppliers of ECM products and services have been eliminated from all of the results.



Job Roles

54% of respondents are from IT, 30% have a records management or information management role and 18% are line-of-business managers.



Appendix 2 - Selective Comments

Do you have any general comments to make about your SharePoint deployments? (Selective)

- On-going user adoption is usually the main challenge we experience with our deployments - engaging line managers to put on more of their systems and services would support our drive to increase organization-wide usage.
- Biggest challenge at my org is that our SharePoint plan is an IT driven initiative. Not much buy-in from other depts, because they don't know enough about what is going on and what you can do with SharePoint.
- SharePoint is seen within our organization as a jack of all trades but master of none.
- In general, our 2007 deployment was a train wreck, we are only now starting a 2010 deployment.
- Deployment of new functionality on SP always seems to take longer than hoped.
- Decision: can it fully meet all of our ECM and RM needs - allowing us to drop our other legacy ECM/RM software?
- As a DoD contractor, my organization has a long way to go to identify the strengths and weaknesses of a cloud-based document repository. There are multiple regulations we have to comply with that we haven't yet been able to see if SP 2013 will meet.
- Microsoft is pushing new version of SP too quickly. We can hardly get used to one before the next version is out. We have decided to stick with 2010 and will likely bypass 2013.
- The deployments are normally a breeze, it's migrations that are a horror.....
- I love 2013!
- By taking away SharePoint Designer, our in-house expertise is being drained away which inevitably increases our costs.
- SharePoint upgrades continue to be disastrous, including Office 365 service upgrades. Always migrate; never upgrade, unless you have no choice.
- Microsoft does a less than ideal job with their OOTB features. The dependence of 3rd party requirements to make Sharepoint work is extremely frustrating and limiting.
- SharePoint: still difficult to have a seamless experience, still difficult to govern, still hidden costs or dependencies especially for big companies. SharePoint is NOT a multilingual platform.
- Microsoft still doesn't do proper Records Management out of the box - consultants who try to make it 'fit' are misleading their clients. We've struggled with this for a long time and are now implementing a third-party application to do records management for us as it is much less complicated.
- We're using the migration from 2007 to 2013 as an opportunity to redesign based on new capabilities and architecture. An extended feature set in 2013 allows us to reduce the level of external customization considerably.
- We've just implemented 2010 - MUCH better than 2007!

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SharePoint 2013 records & ediscovery^P

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Managing Records & eDiscovery with SharePoint 2013

Manage records, ensure compliance, and prepare for civil litigation requests.

Course Benefits and Objectives

70% of organizations currently use SharePoint – but nearly 50% of them have reservations about its ability to meet their compliance requirements. With the introduction of SharePoint 2013 and Office 365, Microsoft has made significant functionality changes. To optimize their investment in the platform, organizations must now determine the impact that these changes will have on their compliance and eDiscovery strategy.

AIIM's Managing Records & eDiscovery with SharePoint 2013 is founded on these considerations and best practices to provide you with a systematic approach for designing an effective SharePoint 2013 environment for managing records and eDiscovery. The course reflects the changes inherent in SharePoint 2013, and is applicable across all industries. (*SharePoint is a registered trademark of Microsoft Corporation*).

Your Learning Options

The Managing Records & eDiscovery with SharePoint 2013 course is comprised of 10 modules that may be purchased individually or as a complete package leading to the AIIM Managing Records & eDiscovery with SharePoint 2013 Practitioner designation that is earned upon successful passing of the exam. Once purchased, the course module(s), supporting materials, and exam are accessible online and on demand from AIIM's training portal for up to 6 months. Upon occasion, this course is also offered in a live, instructor-led virtual classroom format.

Our enrollment page at www.aiim.org/training will indicate when/if such a class has been scheduled.

This course is ideal for...

IT, records managers, compliance officers, site owners, business unit managers, and other information management professionals who use SharePoint 2013. While the focus is on managing records and eDiscovery activities, the techniques imparted can be used to manage any information in the SharePoint environment. You'll acquire the necessary skills to:

- Design a pragmatic framework for managing information assets
- Better manage records to ensure legal and regulatory compliance
- Improve eDiscovery preparedness while reducing legal costs
- Leverage existing investments in the SharePoint platform



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