

Industry Watch

The Impact of SharePoint - 2016

Underwritten in part by:





About the Research

As the non-profit association dedicated to nurturing, growing and supporting the information management 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. 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 2016, www.aiim.org”

Rather than redistribute a copy of this report to your colleagues or clients, we would prefer that you direct them to www.aiim.org/research for a download of their own. Permission is not given for other aggregators to host this report on their own website.

Our ability to deliver such high-quality research is partially made possible by our underwriting companies, without whom we would have to return to a paid subscription model. For that, we hope you will join us in thanking our underwriters, who are:



Colligo Networks Inc.
 400-1152 Mainland St
 Vancouver, BC, V6B 4X2
 Canada
 ☎ +1.866 685 7962
 ☎ +1 604 685 7962
 ✉ sales@colligo.com
 🌐 www.colligo.com



Gimmel
Information Management for Everyone!
Gimmel
 24 Greenway Plaza, Suite 1000,
 Houston, TX 77024
 ☎ 877 944 6625
 ✉ sales@gimmel.com
 🌐 www.gimmel.com



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 commentary made in this report are independent of any bias from the vendor community.

The survey was taken using a web-based tool by 274 individual members of the AIIM community in June of 2016. Invitations to take the survey were sent via email to a selection of the 195,000 AIIM community members.

Survey demographics can be found in Appendix 1. Graphs throughout the report exclude responses from organizations with less than 10 employees.



About AIIM

AIIM has been an advocate and supporter of information professionals for over 70 years. The association mission and AIIM Market Intelligence, 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 representing the entire information management community: practitioners, technology suppliers, integrators and consultants, and provides independent research, education and certification programs to information professionals around the world.

– **Bob Larrivee**
Vice President and Chief
Analyst of AIIM Market
Intelligence



About the author

An internationally recognized subject matter expert and thought leader with over thirty years of experience in the fields of information and process management, Bob is the recipient of the Cenadem Brazil – ECM pioneer Award, and an avid techie with a focus on process improvement, and the application of advanced technologies to enhance and automate business operations.



© 2016

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

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

Table of Contents

About the Research.....	1	Governance.....	24
Process Used and Survey Demographics.....	1	Records Management (RM).....	24
About AIIM.....	2	Information Governance.....	24
About the author.....	2	Misalignments.....	25
Introduction.....	4	Capture and Declaration.....	25
Key Findings.....	4	Futures, Spend, and Opinions.....	26
General Perspectives.....	6	SharePoint Strategy.....	26
Organizational Use.....	6	Lessons Learned.....	26
Adoption.....	7	Opinions.....	27
Versions.....	7	Spend.....	28
Project Status.....	9	Add-on Spend.....	29
Project Progress.....	9	Conclusion and Recommendations.....	29
Reasons for Project Stall or Failure.....	10	Recommendations.....	30
Project Revitalization.....	10	Appendix 1: Survey Demographics.....	31
User Perceptions.....	11	Survey Background.....	31
ECM/DM.....	11	Appendix 2: General Comments.....	33
Collaboration.....	12	General Comments.....	33
ECM Functionality.....	13	Underwritten in part by.....	34
Process and Connectivity.....	13	About Colligo.....	34
Mobile Capabilities.....	14	About Gimmel.....	34
Performance.....	15		
Issues.....	15		
Workflow Issues.....	16		
The Cloud.....	17		
Plans.....	17		
Drivers for Cloud.....	17		
Cloud in Use.....	18		
Concerns.....	19		
Add-on Products.....	19		
Optimizations Used.....	19		
Third Party Products.....	20		
Auxiliary Products.....	20		
Access/Connection/Mobile.....	21		
Access Methods.....	21		
Systems Linkage.....	22		
Linkage Issues.....	22		
Planned Connections.....	23		



Introduction

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

- 1 **Forty percent of organizations say their SharePoint implementation was not a success. Inadequate user training (67%), hard to use (66%), and lack of senior management support (64%) are cited as reasons for SharePoint projects stalling or failing.**
- 2 **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

- 1 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.
- 2 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.
- 3 Looking at SharePoint from a process and enterprise connectivity perspective, 72% of organizations show no support for mobile device use. Nearly a quarter say they widely use enterprise search, and 19% cite wide use of SharePoint for review and approval processes.
- 4 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.
- 5 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 say it is inconsistent metadata and classifications presenting the biggest issue for their organization.

Cloud/Mobile/Access

- 1 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.
- 2 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. Twenty-nine percent view a move to the cloud/365 as a move toward cost savings in IT.
- 3 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.
- 4 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

- 1 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.
- 2 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.
- 3 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

- 1 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.
- 2 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

- 1 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.
- 2 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.

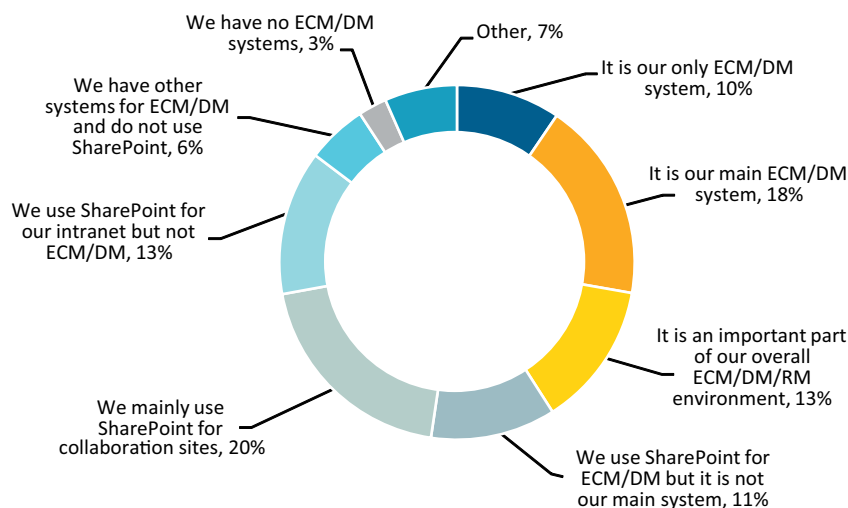


General Perspectives

While still widely used as a collaboration tool or positioned as a digital work space, the use of SharePoint for ECM and DM purposes continues to strengthen, rising slightly from 25% to 28% who cite SharePoint as their only (10%) or main (18%) ECM/DM system. Positioned by many as a platform, 13% of respondents cite SharePoint as important for their overall ECM/DM environment with 11% saying they do use SharePoint for ECM/DM, but it is not their main system. (Figure 1)

Organizational Use

Figure 1: How would you describe the use of SharePoint as an ECM/DM system across your organization? (N=273)

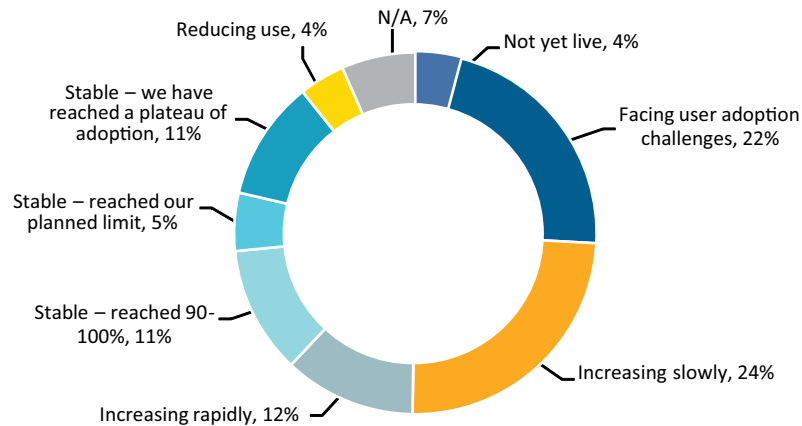


Adoption

Even with 22% of respondents facing user challenges in the adoption of SharePoint, 11% say they have reached a plateau of SharePoint adoption. In addition, 5% indicate they have reached their planned SharePoint limit, indicating a high degree of success for these organizations. Eleven percent say they are at the 90% plus mark, with 12% indicating SharePoint adoption in their organizations is increasing rapidly. (Figure 2)

It is the reference to the term “planned” that stands out, as this is a key factor for success. Where many organizations view technology as a solution to a business problem rather than part of the larger information ecosystem serving as a tool, it is the combination of people, process, governance, and technology that unite to become a solution focused on resolving an identified business problem.

Figure 2: At what pace are office staff adopting and using SharePoint? (N=271)



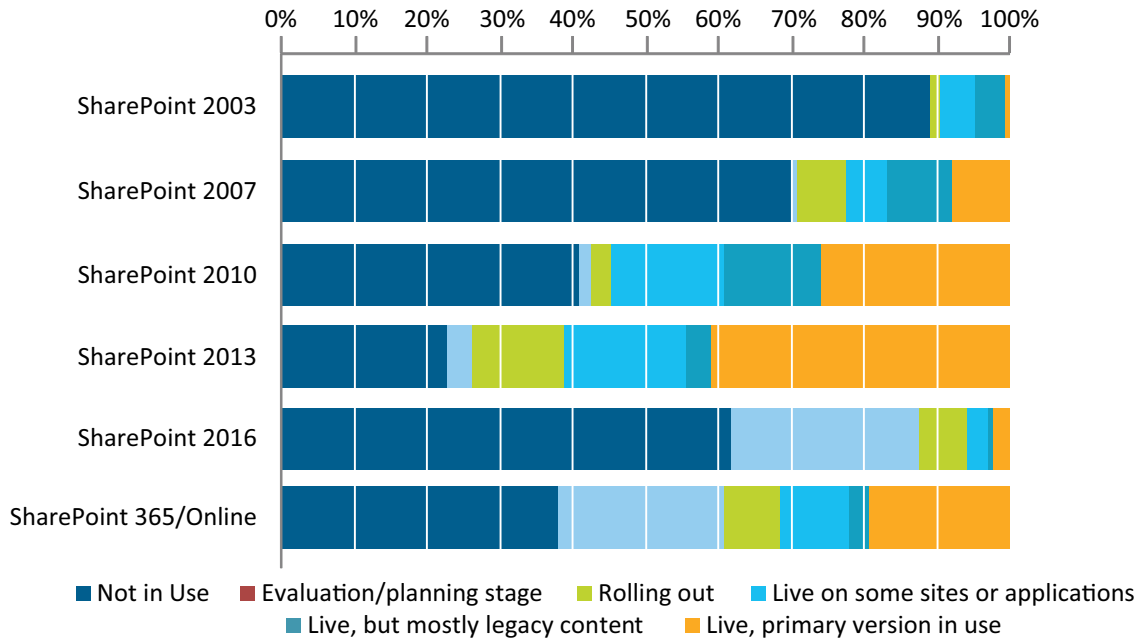
Versions

While having a single version of SharePoint is true for 41% of our respondents, 45% are supporting two or more live versions with 3% of those supporting five or more. This is not surprising given that data from other AIIM reports reflects multiple ECM systems in use for many organizations. It is also an indication of siloed activity within an organization, rather than a planned, overarching framework that would provide a solid, standardized platform across the enterprise.

The fact that there are multiple versions in place inevitably adds to the load for the support department, and restricts the ability to move the organization to the cloud even if the wish is there. It could also be that due to specific customizations within departmental SharePoint implementations, updating to the latest version of SharePoint can be somewhat difficult.

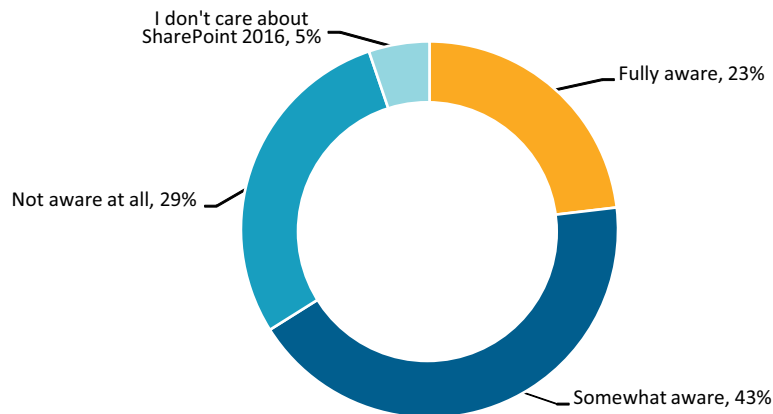
AIIM research data show that 41% of our respondents are using SharePoint 2013 as their primary live version with 26% still using SharePoint 2010. Some organizations (19%) are currently live with SharePoint/Office 365 and 2% with SharePoint 2016, the latter just being released this year. (Figure 3)

Figure 3: What is the status of the following SharePoint versions in your organization? (N=270)



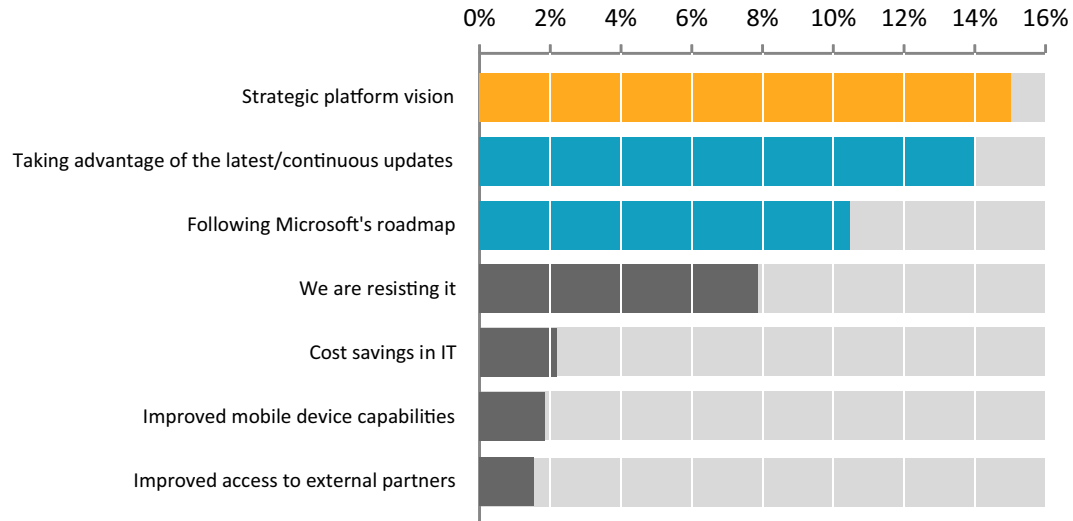
When asked about SharePoint 2016 and the new features it provides, 29% say they are not aware at all, and 43% say they are somewhat aware of what SharePoint 2016 offers. Only 23% say they are aware of the new enhancements in SharePoint 2016. (Figure 4) This is an indication that either the user community has little interest – as specifically indicated by 5% of our respondents – or that the message from Microsoft is lacking. Either way, when a majority of this size indicates they are unaware, it is an opportunity for, and an indication of, the need for Microsoft and its partners to better educate the user community.

Figure 4: Are you aware of SharePoint 2016, and the stated enhancements it offers? (N=268)



For those who are aware and planning for SharePoint 2016, indications are that the majorities see this as following the SharePoint upgrade path (14%) or the Microsoft roadmap (11%). Fifteen percent see a move to SharePoint 2016 as part of their strategic platform vision in building their information management ecosystem. (Figure 5)

Figure 5: If you are planning to move to SharePoint 2016, what is your primary driver? (N=257)



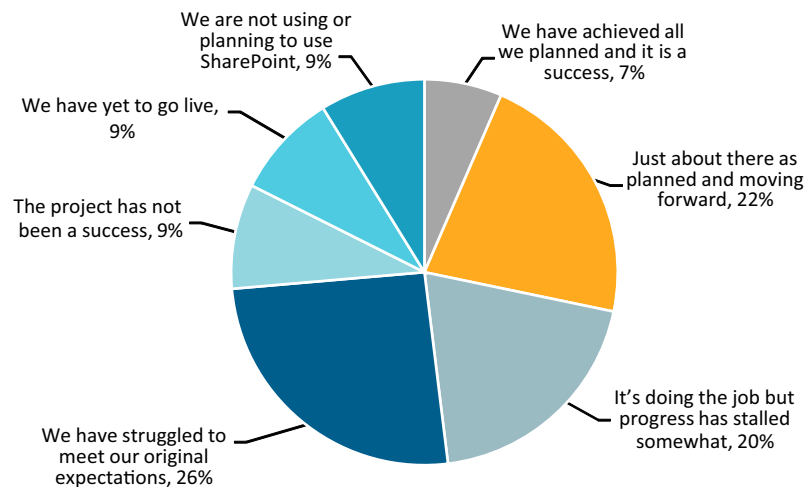
Project Status

Project Progress

Most “enterprise” projects suffer from high expectations and low outcomes, so it is of no surprise that respondents view their SharePoint projects struggling to meet their expectations (26%), or that progress has stalled (20%). Typically we find this is due to poor initial planning and little to no focus on business problems or processes, increasing complexity, a lack of user training, and reluctance to give up the use of file shares and personal folders.

The good news is that 22% say their projects are moving forward with an additional 7% citing they have successfully achieved their planned goals. Twenty percent of our respondents indicate that SharePoint is doing the job for them, but progress has somewhat stalled at this time. (Figure 6) It is possible that while these 20% of organizations have accomplished their initial goals, future expansion or expanded use of SharePoint may not be planned at this time, or they are in a state of paralysis as to how to proceed going forward. This is often the case for tactical projects, where there are no plans for continuous improvement upon project completion.

Figure 6: Thinking about the scope and development of your SharePoint ECM project, how would you best describe your progress? (N=262)

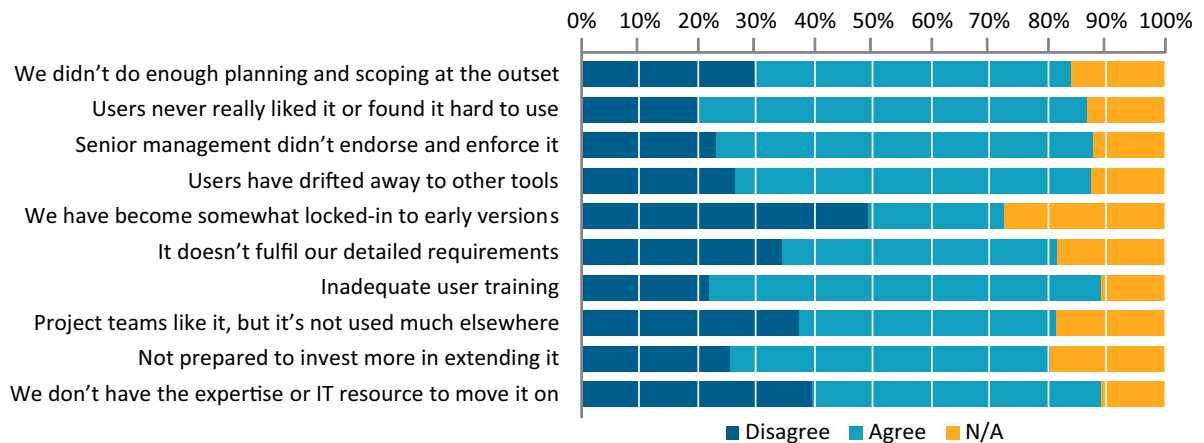


Reasons for Project Stall or Failure

While 28% of our respondents view their projects as successful, 40% indicate the opposite. When we asked about the reasons a project stalled or failed, inadequate user training (67%), hard to use (66%), and lack of senior management support (64%) were cited as the top reasons. (Figure 7) This indicates that even though senior management may have driven a SharePoint project initially, sustained support may be lacking.

While use of SharePoint may seem difficult and hard, it is possible that proper user training in the application, as well as the reasons for SharePoint use, could be of benefit not only for moving a project forward, but also increased user adoption.

Figure 7: Which of the following reasons would best apply to why your SharePoint project is stalled or failed? (N=128)

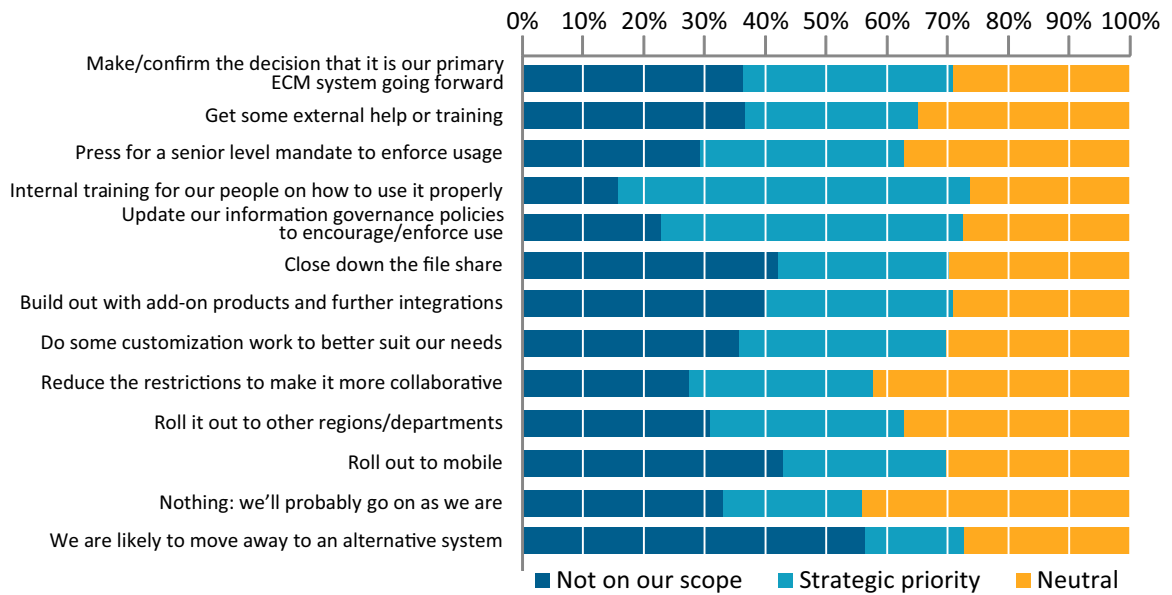


Project Revitalization

So if these are the challenges and reasons for a stalled or failed project, what steps are being taken to get things back on track? We asked our respondents to choose all of the actions listed that they felt applied to them. Findings reveal that internal training is the priority for 58% of our respondents, while 50% plan to update and enforce their Information Governance (IG) policies. Confirmation of the decision to make SharePoint the primary ECM system is a top priority for 35% of respondents. (Figure 8)

Ideally, there is a combination of these actions taking place to get these projects back on track. Confirmation by senior management that SharePoint is to be the primary ECM system along with the business reasons and a shared vision should be part of the on-going project communications effort. This should also be part of the internal training along with the updated IG policies and procedures, and technology use. Internal training should also include a mechanism for feedback to the project team and internal SharePoint support resources, as part of a continuous improvement initiative to identify and act upon opportunities to refine the user interface, expand use, and enhance capabilities that increase SharePoint's business value to the organization.

Figure 8: What steps are you taking to re-energize your SharePoint deployment? (N=127)



Communicating a clear vision of the role and importance of SharePoint, regular communications regarding project status to the user community, and training on IG practices and the technology are key to keeping SharePoint projects on track.

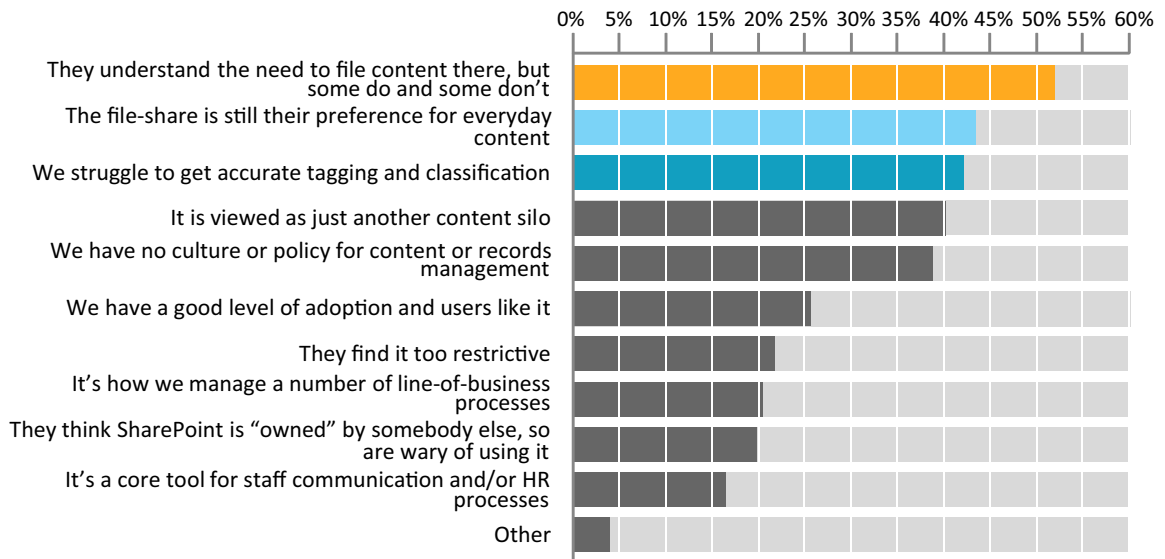


User Perceptions

ECM/DM

When we looked in more detail at the way users consider SharePoint in relation to ECM/DM use, our respondents were given an opportunity to choose all of the listed items they felt were applicable to their organization. As a result we find that there is an acknowledgement of the need to store content in SharePoint, but admittedly they don't always do it (52%), and that file-share use is still preferred for everyday content (43%). (Figure 9) These appear to be cultural elements that could be addressed through better training and IG. This may also address the concerns of 42% who cited classification challenges as well.

Figure 9: From the ECM/DM point of view, how would you describe the way your users consider SharePoint? (N=152)

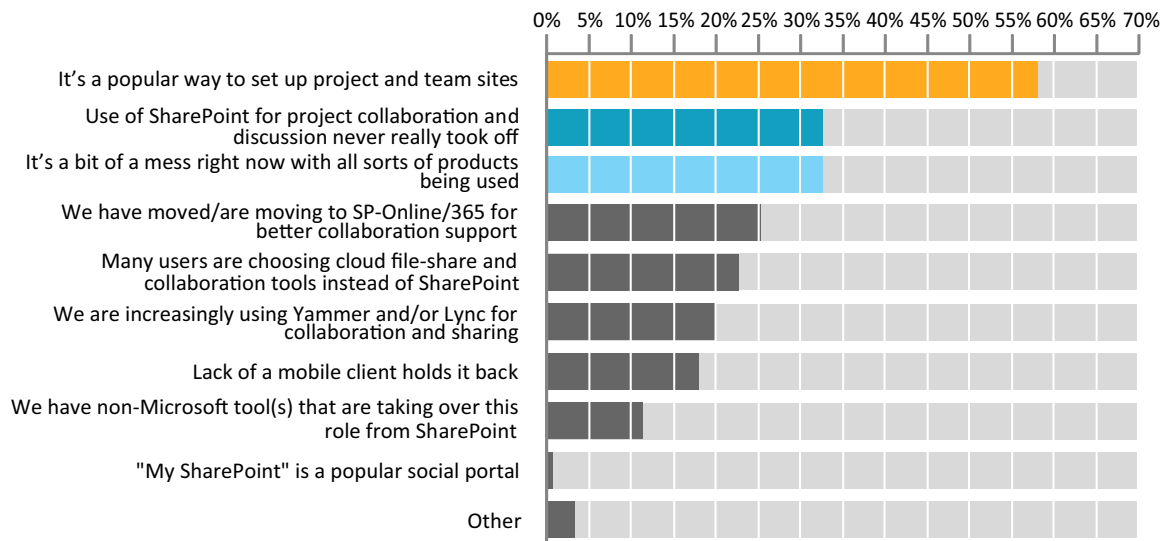


Collaboration

Turning our attention to collaboration and content-sharing, we asked our respondents to choose all of the listed items they felt applied to user considerations related to SharePoint. Since SharePoint was originally positioned as a collaboration tool, it is somewhat surprising to find that one-third of respondents say that project collaboration with SharePoint never took off, and one-third say that their collaboration is a mess due to the use of multiple products. On the upside, 58% do in-fact say it is a popular tool for projects and team sites. (Figure 10)

The lack of consideration for using SharePoint as a collaboration and content-sharing tool can be seen as a result of poor or inadequate training and IG policies. In many cases, SharePoint is installed with the message that it can be used as a digital work space for sharing and collaboration without further explanation and training as to how this is properly done and managed.

Figure 10: From the collaboration and content-sharing point of view, how would you describe the way your users consider SharePoint? (N=150)

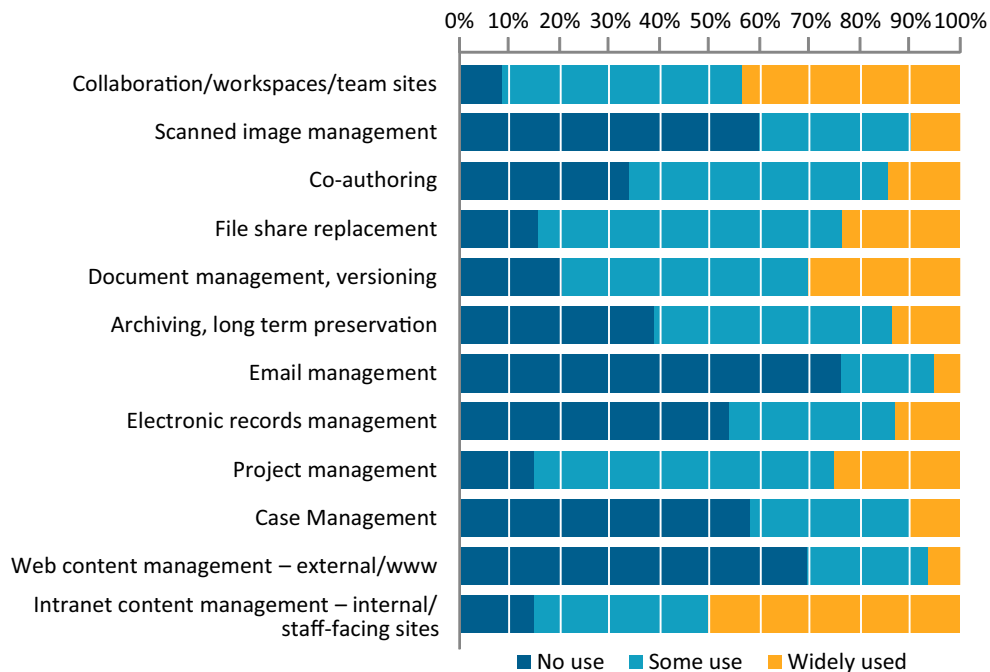


ECM Functionality

SharePoint is often described and positioned as a multi-purpose platform, and this is reflected in the range of usage across different functionalities. Internal or staff-facing sites are widely used by half of our respondents, while 44% say SharePoint is widely used for collaboration, work spaces, and team sites. (Figure 11)

Given all of the attention placed these days on the content contained within email messages, one would think that email management would be a major focus, yet 76% of our respondents say they do not use email management. When you look at the integration capabilities of SharePoint with Outlook, both out-of-the-box and through third-party add-on applications, this should be an easy decision to make in an effort to gain greater control over correspondence and minimize risks.

Figure 11: How would you describe your use of SharePoint in the following content management areas? (N=157)

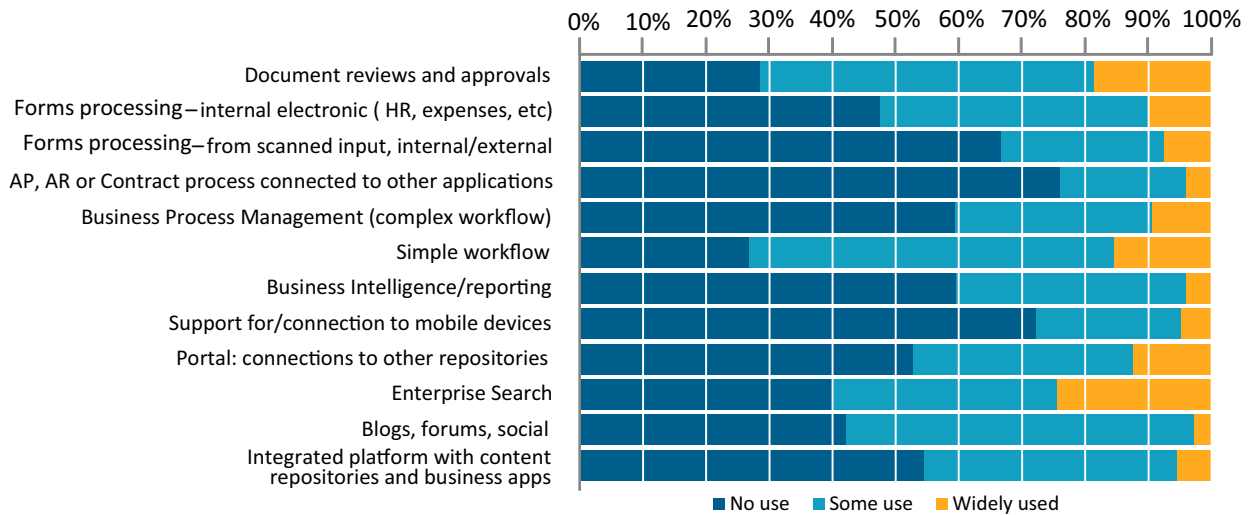


Process and Connectivity

Many organizations understand the connection between process and their information assets, recognizing that content without process goes nowhere, and process without content serves no purpose. This means there must be connectivity between business processes and business information. For 19% SharePoint is in wide use for review and approval processes. Searchability and findability are also key components of any process, in that actions cannot be taken when information is needed and unavailable. To this end, 24% of respondents say they have enterprise search in wide use.

In today's business world, it is common to have employees working from home or field locations, and even while traveling around the globe. Yet, for 72%, there is no support for mobile device use with their SharePoint implementation. (Figure 12) This is an area of great opportunity for business organizations to maximize the return and value of their SharePoint systems, by extending SharePoint capabilities and process engagement beyond corporate walls. Mobile device use will improve productivity and operational efficiency, enabling employees, partners, and suppliers to interact on an everywhere, anytime basis.

Figure 12: How would you describe your use of SharePoint in the following process management and enterprise connection areas? (N=162)

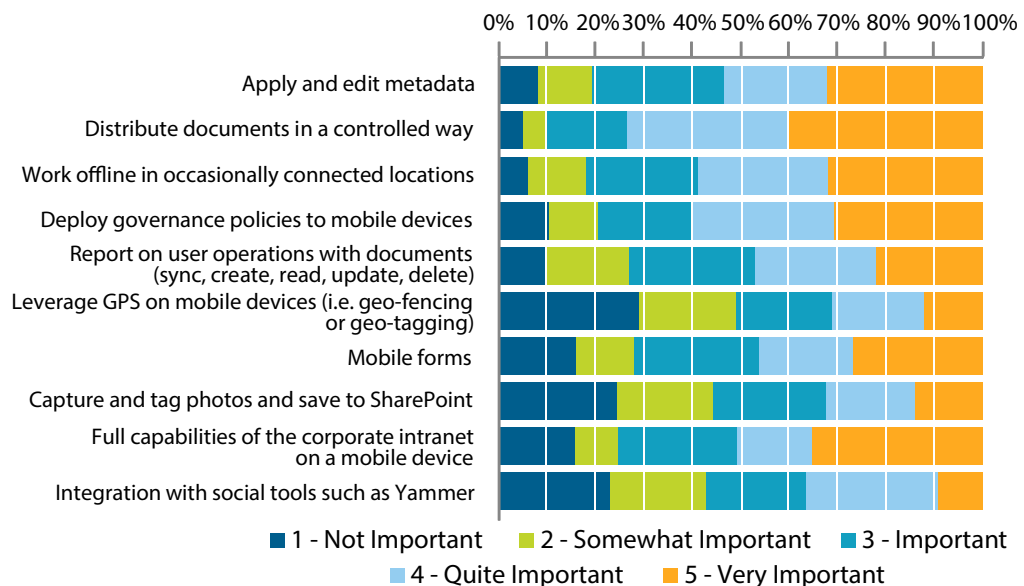


Mobile Capabilities

Even though the majority of respondents see no support for mobile device use with SharePoint, that does not mean it is irrelevant. When asked about the usefulness of mobile application capabilities, 90% recognize it as important to very important to be able to distribute documents in a controlled way and 78% cite it as important to very important to provide intranet capabilities. (Figure 13)

The simple fact is that mobile device use is here, and for many organizations, it is in-use, whether they know it or are willing to admit it. Today's business organization must be flexible and agile enough to respond to rapidly changing client, industry, and regulatory demands. The mobile workforce is growing and in need of extended capabilities.

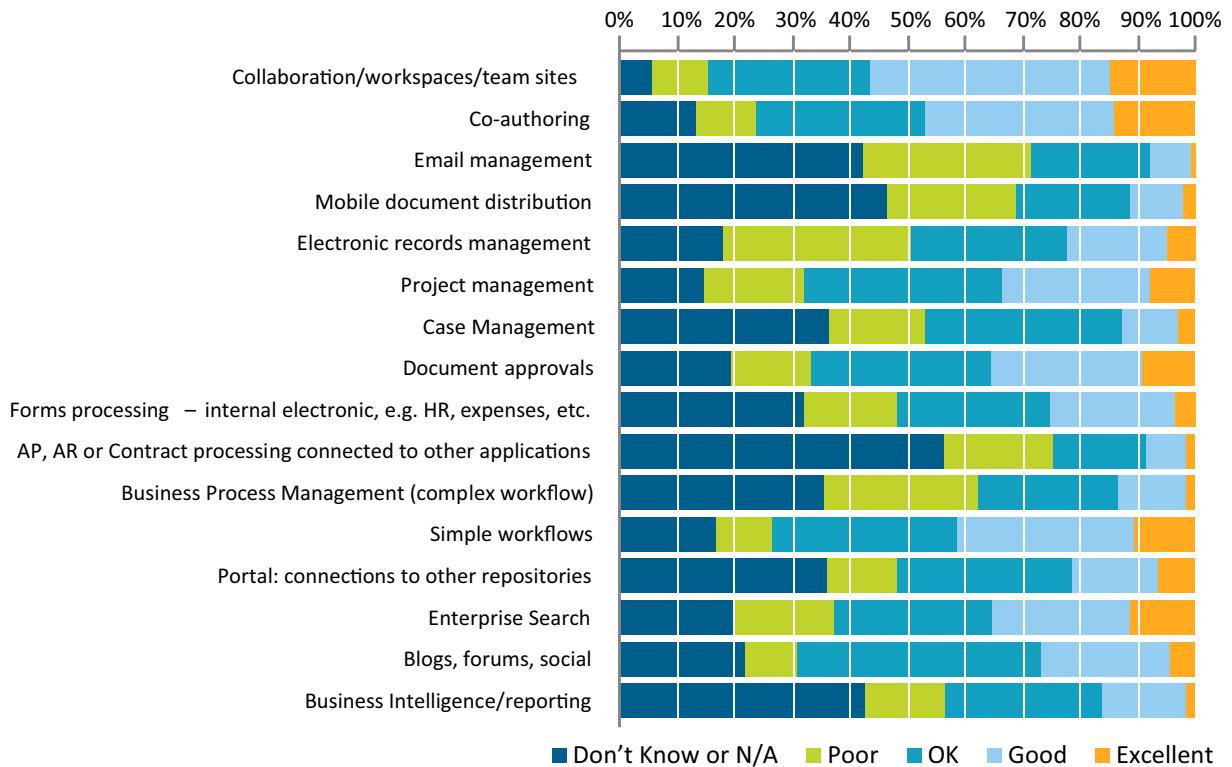
Figure 13: How would you rate the usefulness of the following capabilities in a mobile application of SharePoint? (N=135)



Performance

When looking at performance and what you can do with SharePoint as-is, collaboration and team sites fare quite well with 42% citing it as good and 15% as excellent. Keeping in line with a collaborative view, co-authoring bodes well with 33% stating it is good and 14% saying it is excellent. (Figure 14) This is an example of organizations focusing on a purpose for SharePoint in the sense they positioned it as a tool to enable and support collaborative work efforts and establishing digital work spaces for functional teams to develop ideas, and create and share content.

Figure 14: How would you rate the performance or capabilities of out-of-the-box SharePoint in the following areas? (N=147)

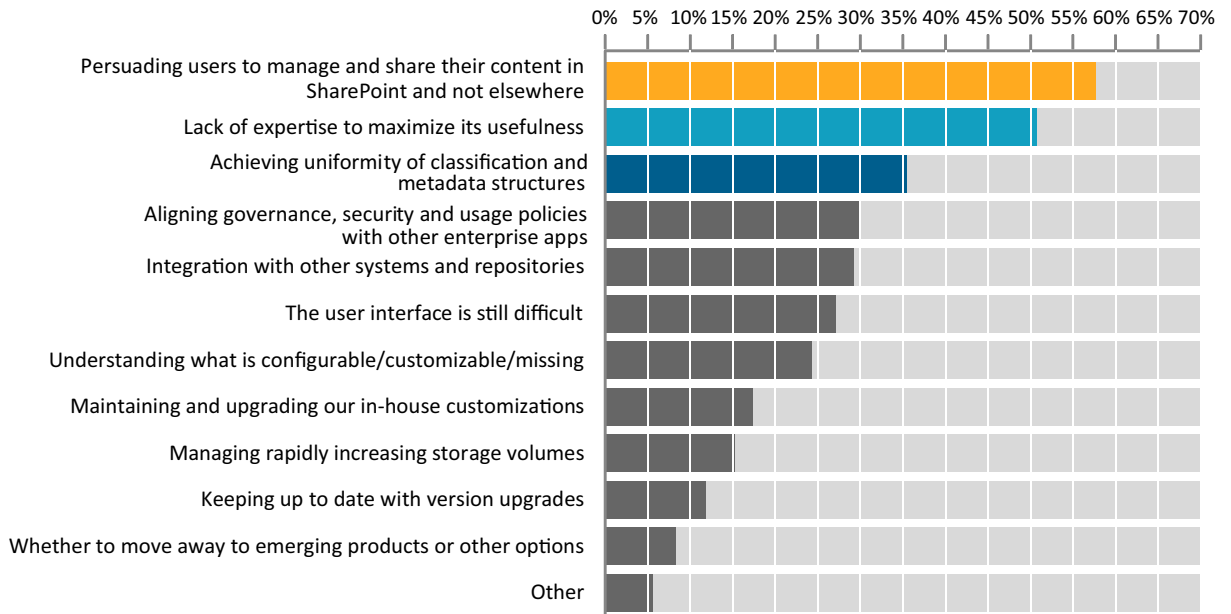


Issues

Given the earlier references to poor user training, and level of difficulty in using SharePoint, it is of little surprise that we find user reluctance to be the top cited issue to using SharePoint (58%). This is compounded by the challenges faced in establishing consistent metadata and classification of content within SharePoint for 35% of our respondents. In part, these go hand-in-hand in that if it is difficult to store and classify information, there will certainly be a high level of difficulty in finding it, which in turn causes the user community to question its integrity and completeness. Expertise is an on-going issue for 51% who say they lack what is needed to maximize SharePoint's use within their organizations. (Figure 15)

So barring the lack of expertise, it is the cultural aspect of SharePoint causing the most angst with inconsistent IG practices compounding the situation. This is an example of technology implemented first, before information management practices are established and stabilized. Sharepoint, as with all technologies, must be planned for and not expected to resolve underlying issues like inconsistent metadata and classification. If it is true in SharePoint, it is likely true of the organization before SharePoint.

Figure 15: What are the biggest on-going issues for SharePoint in your organization? (N=144)

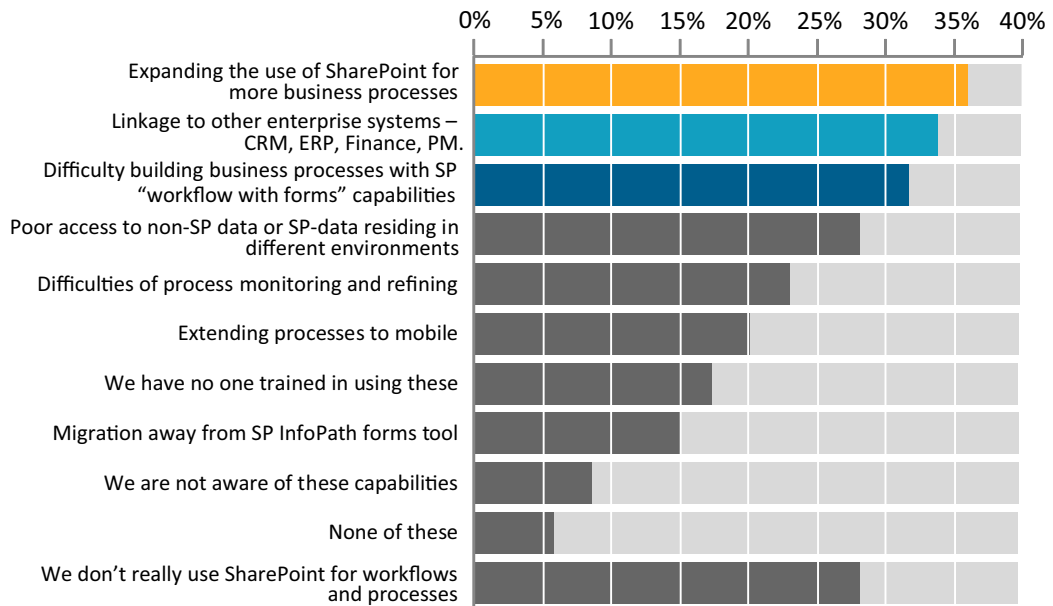


Change management – in terms of cultural change – is to be expected and planned for as SharePoint inherently changes the way employees will work with content and each other going forward. Engagement and education are key to user adoption.

Workflow Issues

As discussed earlier, process and content are tightly related and must be connected in support of business processes and workflows. Linkage between SharePoint and other enterprise systems is the issue for 34%, indicating that to some degree, their SharePoint system has limitations and may possibly be a siloed entity within the enterprise. The challenge is different for the 36% of respondents who cite issues in expanding use of SharePoint for more processes, and 32% who find building workflows with forms to be a challenge. This gets back to usability; the desire is there, but the ability for users to act or expertise to enable growth are sorely lacking. (Figure 16)

Figure 16: Do you have any of these issues with workflows and processes in SharePoint? (N=139)





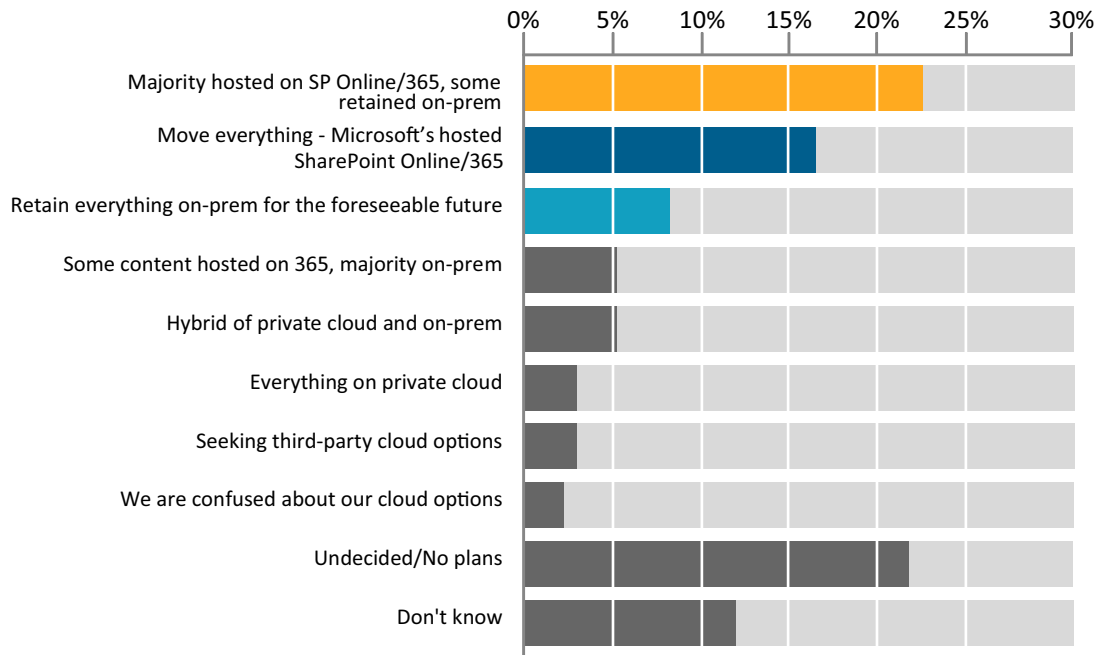
The Cloud

Plans

Conversations about the Cloud and ECM are always interesting and divided. When it comes to SharePoint, 22% of our respondents are currently undecided or have no plans for SharePoint in the cloud at this time. Seventeen percent say they will move to hosted SharePoint Online/365, while 23% say they plan to have a hybrid environment with the majority hosted on SharePoint Online/365 and some remaining on-premise. (Figure 17)

The hybrid approach is not surprising as some organizations may have security concerns or may have regulatory requirements preventing them from placing certain types of information in cloud based applications, such as personal information that must be maintained in region.

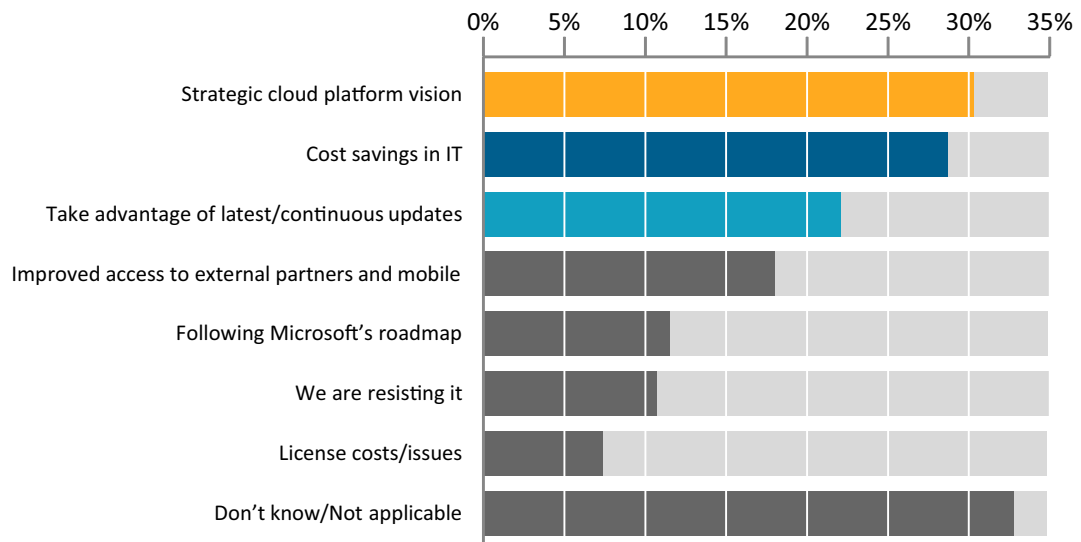
Figure 17: What are your plans for SharePoint in the Cloud? (N=133)



Drivers for Cloud

Turning our attention to drivers for cloud adoption, we asked our respondents to identify their top two primary drivers to move to SharePoint cloud/365. Cost savings in IT is a top driver for 29%, while 22% say they are taking advantage of the latest updates. While these are reasonable reasons for change, 30% say it is part of their strategic cloud platform vision, indicating a solid focus on building around and upon the SharePoint platform. (Figure 18)

Figure 18: If you are moving to Cloud/365, what are your primary drivers? (N=122)

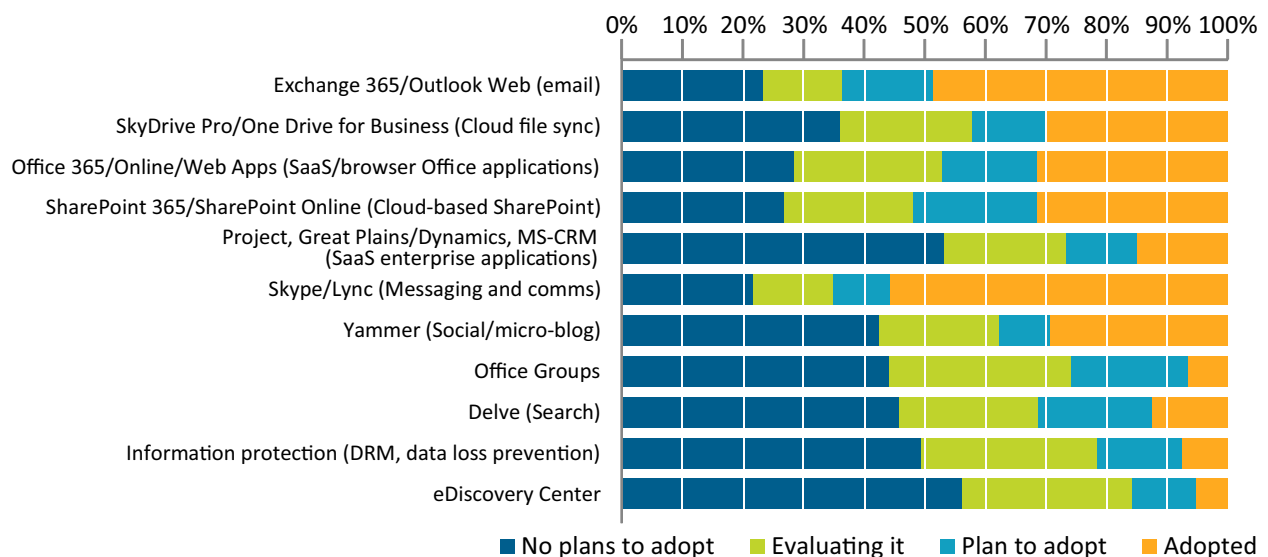


Cloud in Use

As we have seen earlier in this report, there is a lack of awareness of what SharePoint 2016 offers, making Microsoft's offerings confusing as it appears they have not well communicated. Additionally, product names tend to change regularly – especially when an acquisition is involved. The most popular of the Microsoft Cloud offerings is one such product – Skype/Lync – with 56% of our respondents indicating it is in use within their organizations. Exchange 365/Outlook Web is in place with 49% of organizations while, 31% say they are using SharePoint 365/SharePoint Online. (Figure 19)

Interestingly, with recent attention and activity given to file sync and share demands, Microsoft SkyDrive Pro/One Drive for Business (Cloud file sync) falls in at 30% using it. Perhaps this is again a case of poor understanding by the user community as to how this would fit into an overall information management framework. (Figure 19)

Figure 19: Which of the following Microsoft cloud applications has your organization broadly adopted? (N=120)

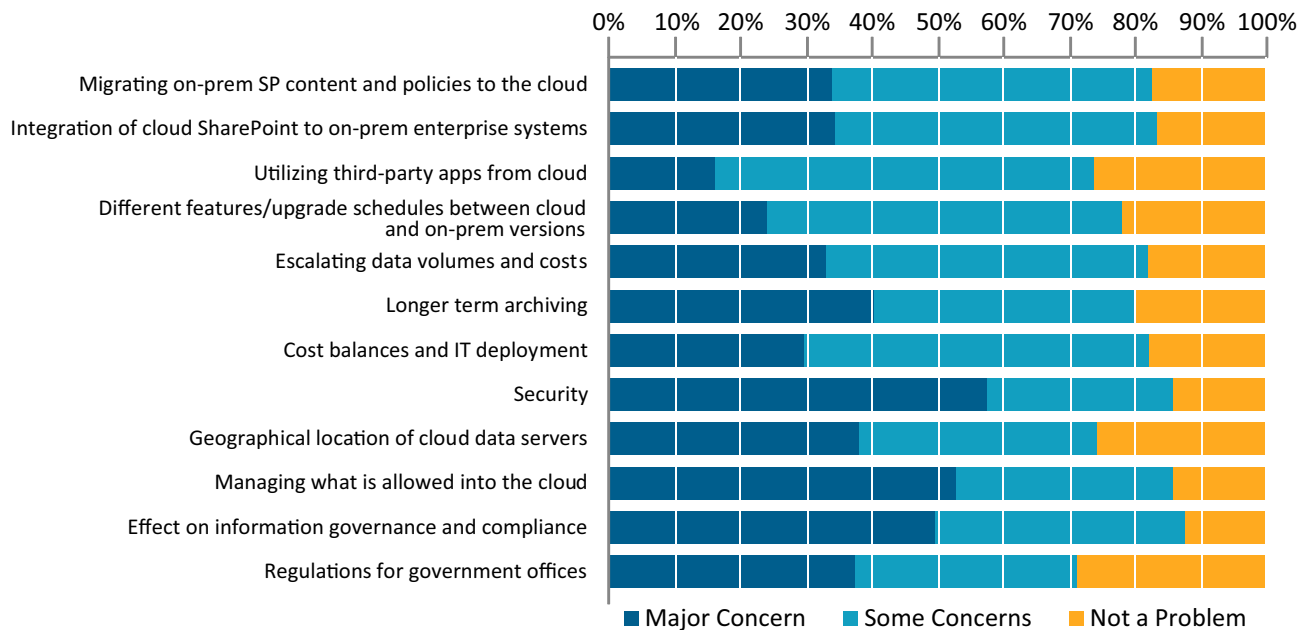


Cloud is one way to improve collaboration capabilities across the enterprise and beyond the corporate walls in a secure and device agnostic manner. This additionally provides support for mobile device use as cloud is typically device agnostic.

Concerns

As can be expected these days, with news stories about security breaches and information theft, 58% of our respondents cite security as an issue of concern for them using SharePoint in the Cloud. Control over what is managed in the cloud is of concern for 53%, with 50% citing concerns over the effect using SharePoint in the Cloud would have on their governance and compliance efforts. While this is a reflection of discomfort with the technology, it should also serve as a call to validate current security and compliance requirements and assess how IG policies and practices meet them, regardless of the technology used. (Figure 20)

Figure 20: How significant would be/are the following issues for you with using a cloud or hybrid solution for SharePoint? (N=118)

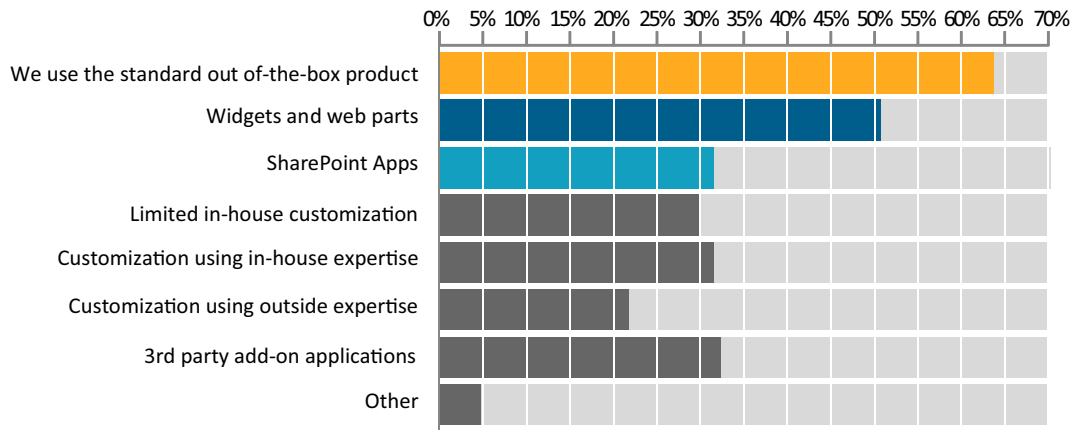


Add-on Products

Optimizations Used

Optimizing any IM technology should be a standard goal for all business organizations, and SharePoint is no exception. When we asked our respondents to choose all of the listed items they felt applied to their SharePoint implementation, 64% said they are using the out-of-the-box features provided in SharePoint. Fifty-one percent say they use widgets and web parts, while, 32% indicate they are using 3rd party add-on products to optimize SharePoint. (Figure 21) Regardless of what is being used, the majority of respondents are trying to maximize their return-on-investment through optimization of some sort.

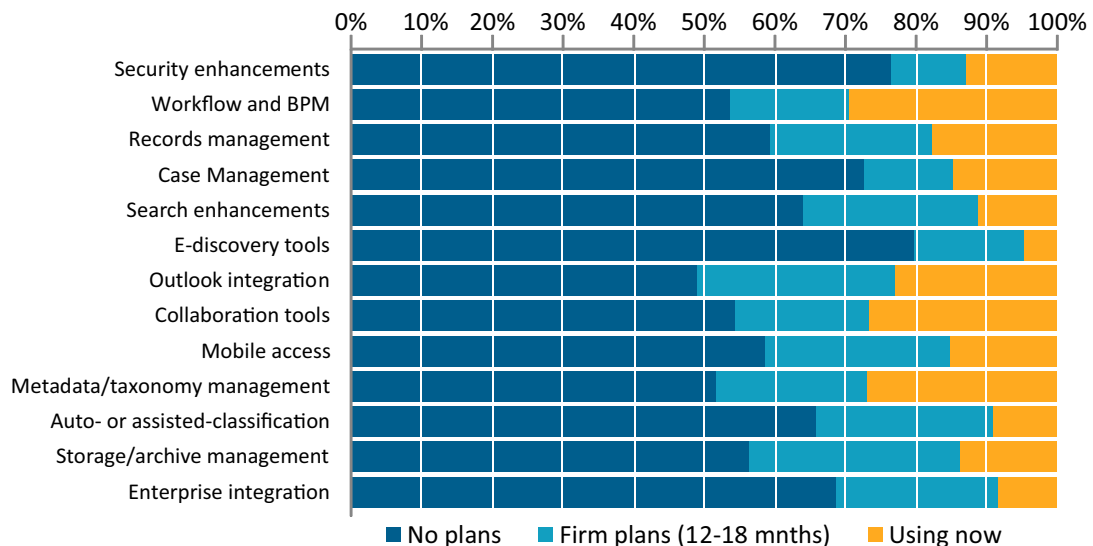
Figure 21: Which of the following optimizations are you using with SharePoint? (N=124)



Third Party Products

Broadening our view of SharePoint optimization, we asked about 3rd party add-on products in use today or in the planning stages to implement within the next 12-18 months. Storage and archive management ranks high on the list with 14% actively using it now and 30% planning to implement it. While email management is not widely adopted as yet, 23% are using Outlook integration today with 28% planning to implement it. (Figure 22)

Figure 22: Which of the following third party enhancement products for SharePoint have you implemented/plan to implement? (N=107)

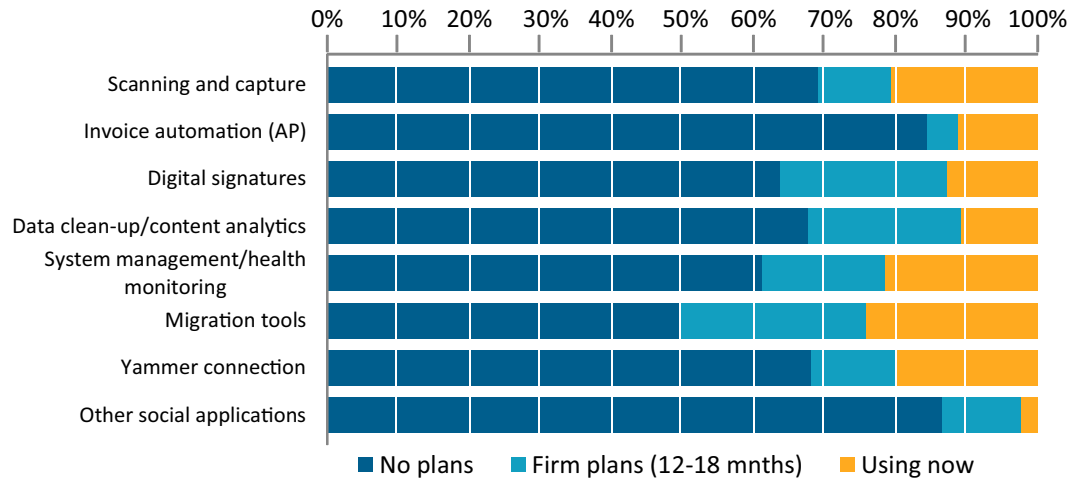


Auxiliary Products

Looking to the auxiliary products that build out the full ECM functionality set, we see that migration tools remain important for 26% of respondents planning to implement them, and 24% who are using them now. This may be an indication of users moving to consolidate disparate repositories into a single SharePoint structure, or even consolidate different instances or versions of SharePoint together. We also find that data clean-up with content analytics is in use by 11%, with 22% planning to implement it within the next 12-18 months. This suggests a concerted effort to eliminate redundant, outdated, and trivial content (ROT) as part of the migration plan. (Figure 23)

In our previous SharePoint report of 2015, we saw digital signatures in use by 9% of respondents. In 2016, this has risen to 13% in use with 23% planning to implement digital signatures within the next 12-18 months (Figure 23), indicating higher levels of comfort with the technologies, and greater clarity in relation to meeting compliance requirements.

Figure 23: Which of the following auxiliary products for SharePoint have you implemented/plan to implement? (N=105)



Data cleanup should be included as part of a migration project, in order to eliminate redundant, outdated, and trivial content (ROT), properly organize business information of value, decrease storage requirements, and lower overall IT costs to maintain the SharePoint environment.



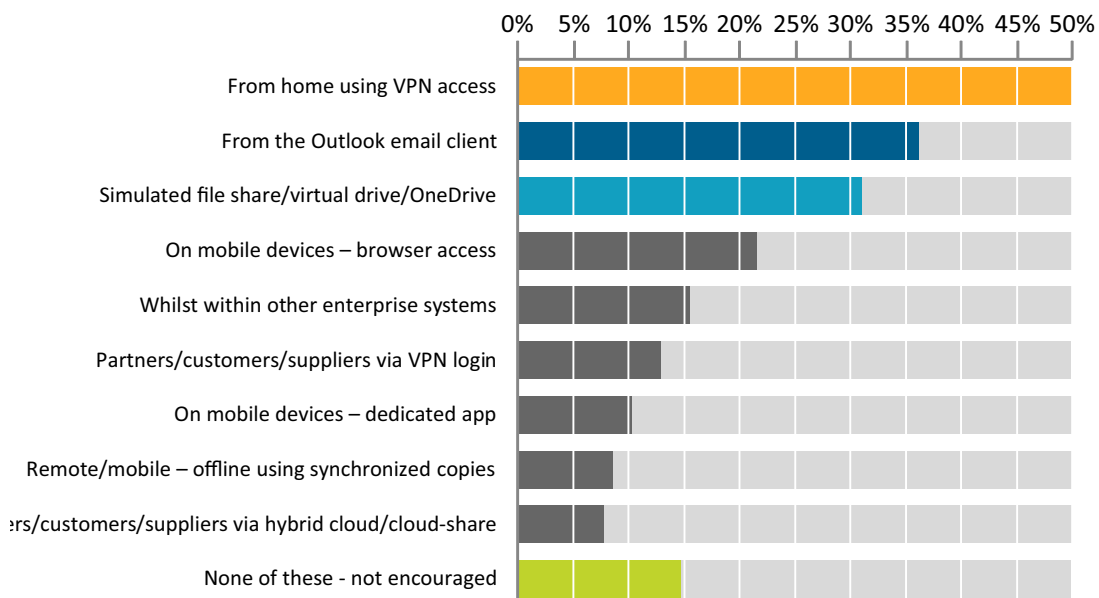
Access/Connection/Mobile

Access Methods

There are a number of ways to access information that is managed within SharePoint. When we asked our respondents to choose their top 3 methods of access, 50% say they access it using a Virtual Private Network (VPN) from home. While this may be limiting, it is perceived as providing the highest levels of secure access. Use of the Outlook client is another popular method used by 36% of respondents, indicating an approach to provide controlled, single point-of-access for the user community. (Figure 24)

According to 15% of our respondents, external access to SharePoint is discouraged by their organization, indicating a level of discomfort or concern over security breaches and information loss. (Figure 24)

Figure 24: In which of the following ways do users access content in your SharePoint system? (N=116)

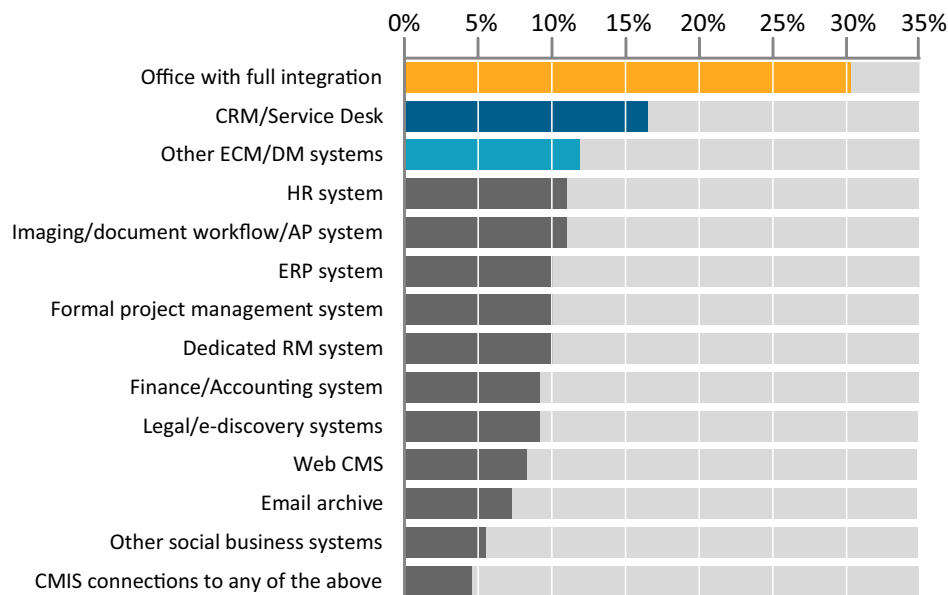


Systems Linkage

The concept of a single point-of-access for the users is not new and does require a level of connectivity or linkage between systems within the enterprise. In days past, this may have meant programmed integration, but today, various levels of interoperability are more than acceptable. It is no surprise that 30% of our respondents indicate they have full integration with the Office applications – though it is surprising to see that number so low. We also find that 17% of our respondents show they have linked SharePoint to their CRM/Service Desk applications, moving closer to the idyllic, seamless, information management environment. (Figure 25)

When it comes to ECM/DM systems, 12% say they have linked their SharePoint system to other ECM/DM systems in their enterprise with only 5% indicating they are using Content Management Interoperability Services (CMIS) to do so. This is somewhat disappointing as CMIS was expected to be the answer to coupling ECM/DM systems together in a rapid and agile manner. Since Microsoft has been an active participant in this initiative, demonstrating its capabilities, one might expect these numbers to be greater. (Figure 25)

Figure 25: Which of these enterprise systems have you connected to SharePoint? (N=109)

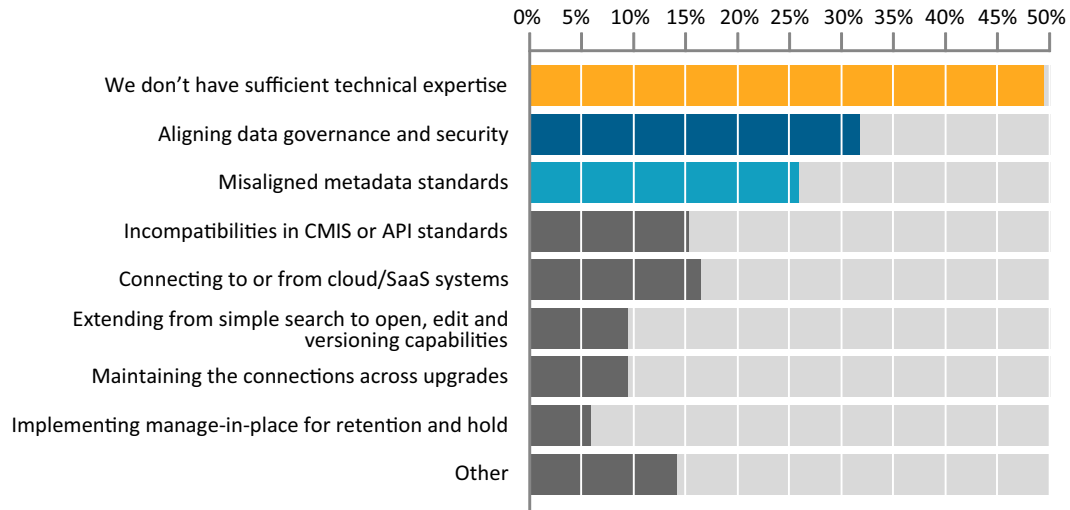


Linkage Issues

Understanding that this level of interoperability can be a challenge, we asked our respondents to identify their top two issues in connecting SharePoint to other enterprise systems. Aside from a lack of technical expertise cited by 49%, the major issues are related to information management practices. (Figure 26)

According to 32% of our respondents, the biggest issue is aligning their data governance with security, and for 26%, it is misaligned data standards, both of which indicate organizational and operational struggles with information management as a whole, regardless of technology. (Figure 26) In many cases we find that while there are well-defined policies and practices around corporate records, there are few if any focused on content, equating to a state of information chaos.

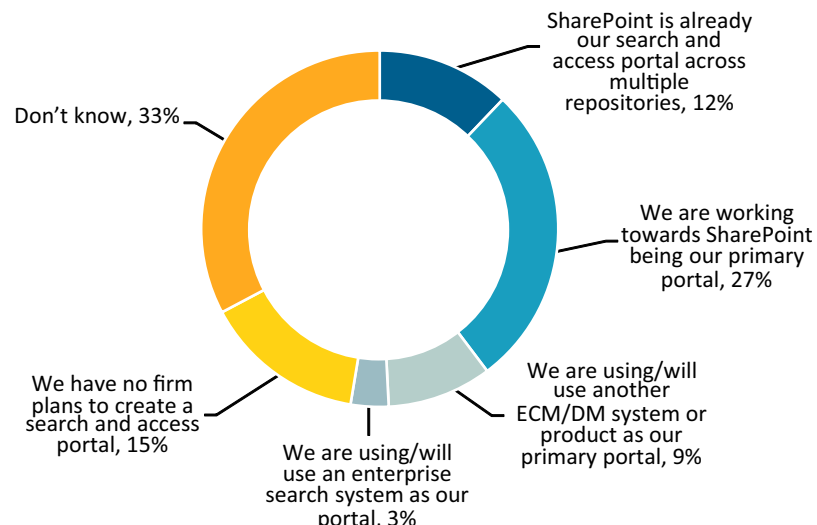
Figure 26: What have been your biggest issues with connecting SharePoint to other enterprise systems? (N=85)



Planned Connections

The concept of providing a simple to use, single point-of-access to all information across the enterprise is not new, and yet, it remains ever elusive. Respondents of our survey indicate that they use SharePoint as a search and access portal to multiple repositories (12%), with 27% working to make SharePoint their primary portal. (Figure 27) This is a great step forward and should be part of an overarching strategy to enhance the user experience, increase findability, and provide secure access every time, from anywhere. But it cannot be done through technology alone.

Figure 27: What is your forward strategy for connecting SharePoint to other enterprise repositories? (N=117)





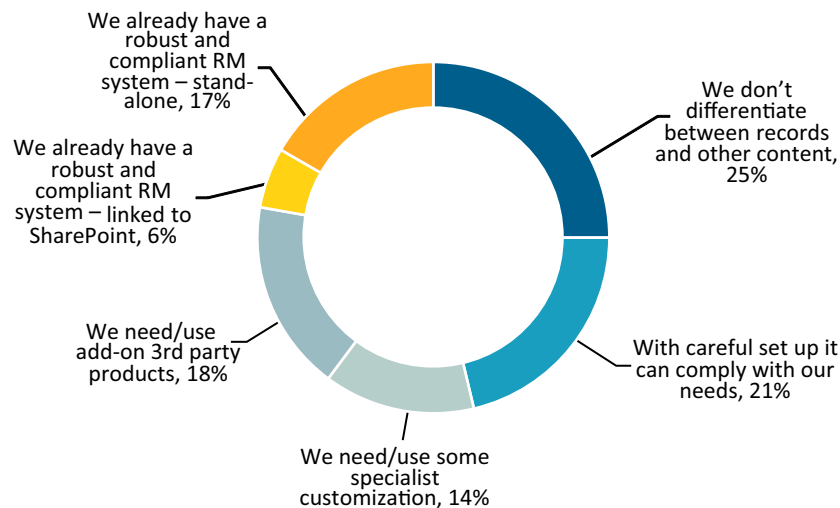
Governance

Records Management (RM)

Over the years, there has been much discussion about SharePoint's capabilities to manage records in a compliant manner. This is especially true of users in regulated industries, that is of course if the organization does in fact differentiate records from content and other forms of information. Our findings show that according to 25% of our respondents, their organizations do not differentiate between records and other content – indicating that they treat everything the same. (Figure 28)

SharePoint does have the capability to meet the records management needs of 21% of our respondents, provided it is set-up carefully and properly to address those needs. Add-on products are the method of choice for 18% who feel this is the best approach to meet their records management requirements. (Figure 28)

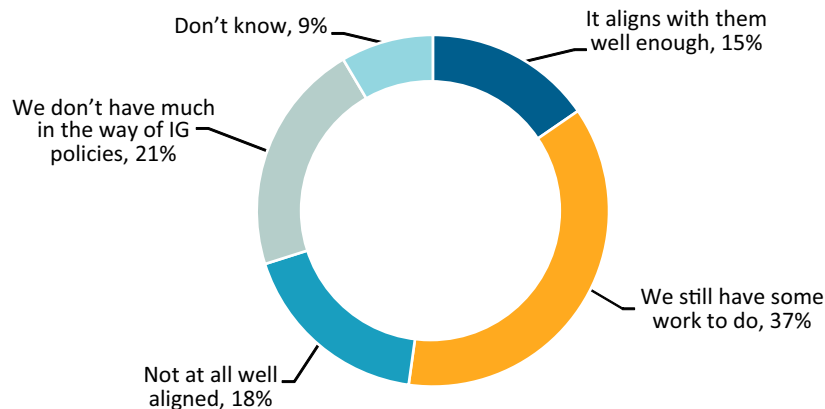
Figure 28: How does SharePoint match your records management needs? (N=108)



Information Governance

So we have seen a lack of differentiating records from other forms of content. It should be of no surprise then, that we now see 21% of respondents indicating they do not have good IG policies, and 37% saying they still have work to do when it comes to aligning SharePoint with their information governance policies. For those who have done the work (15%), SharePoint aligns well with their policies. This should serve as a message to many organizations that technology is not the answer to governance. Governance should be in place regardless of technology and the technology should align to meet your governance and compliance requirements. (Figure 29)

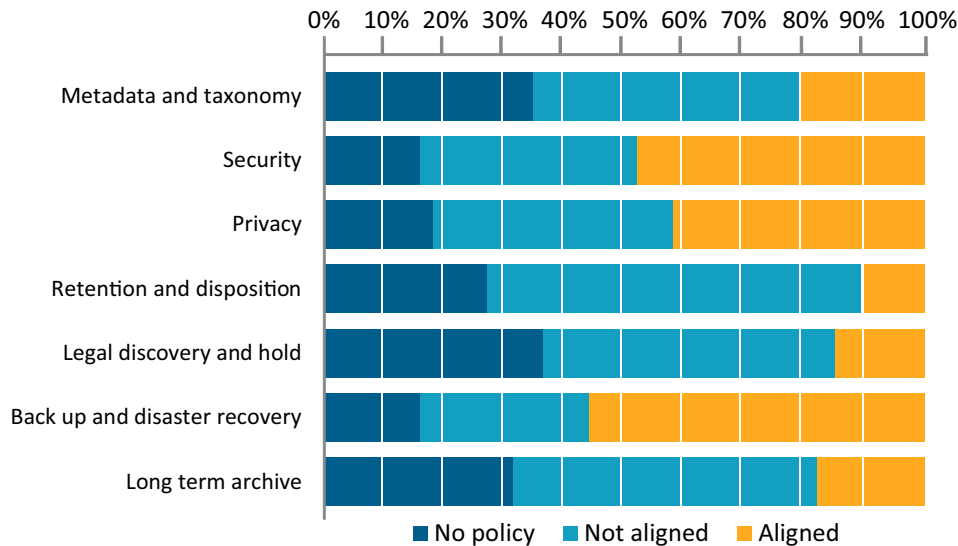
Figure 29: How well aligned is your SharePoint with your Information Governance policies? (N=117)



Misalignments

Probing deeper to uncover the areas of biggest misalignment, retention and disposition are the most troublesome areas for 62% of our respondents, while metadata and taxonomy – information organization – are the biggest for 45% of respondents. (Figure 30) So the question here is one of a lack of policy, or the ability for technology to support the policies? In either case, there must be a middle ground sought and established upon which these organizations can build. On the upside, 56% say back-up and disaster recovery are well aligned with SharePoint, as are security (48%) and privacy (42%). (Figure 30)

Figure 30: Where are your main misalignments? (N=105)

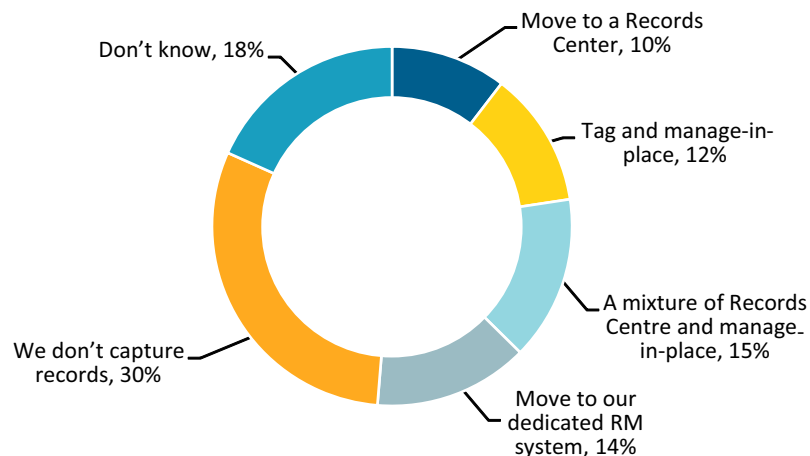


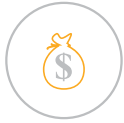
The fact that security, privacy, and disaster recovery are more likely to be aligned with SharePoint does not compensate for the fact that a majority of organizations have IG alignment issues, and in some cases, do not even have policies.

Capture and Declaration

We know that for some, records capture is irrelevant and non-existent (30%) likely due in large part to their lack of differentiating records from content. For those who do focus on records management, 15% say they use a combination of Records Center and manage-in-place, while 14% move their records to a dedicated records management system. (Figure 31)

Figure 31: What is your preferred method of capturing/declaring records in SharePoint? (N=115)



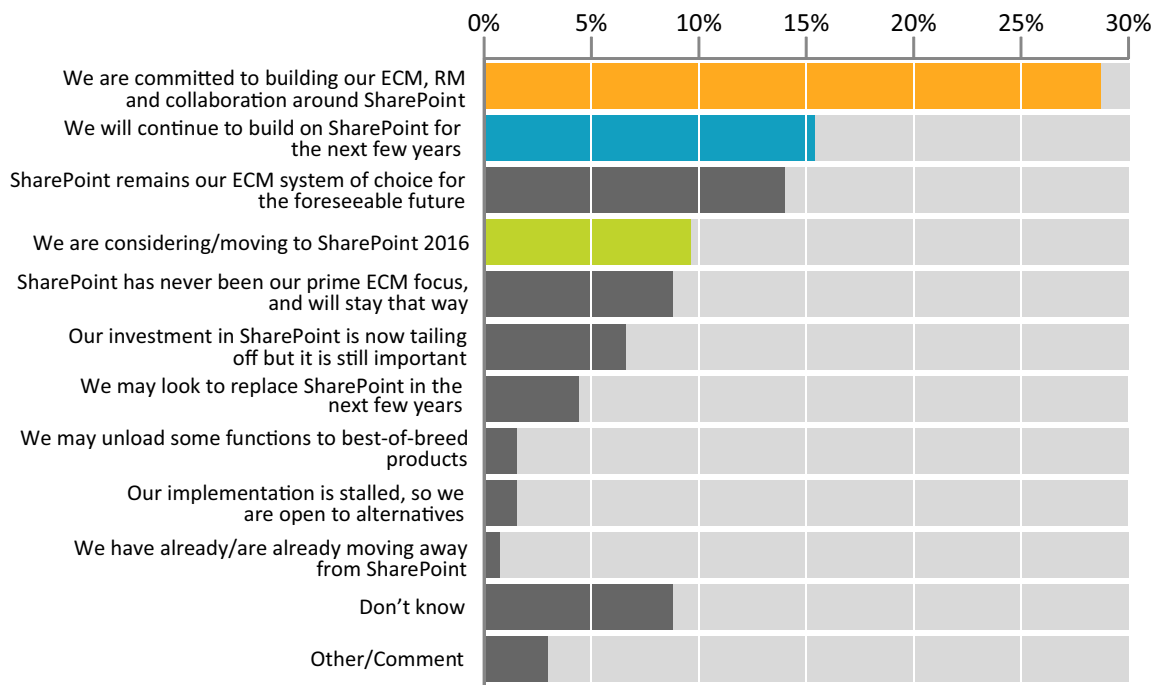


Futures, Spend, and Opinions

SharePoint Strategy

Indications for SharePoint use appears to be strong with 29% of our respondents indicating they will build their ECM, RM, and collaboration around SharePoint, with an additional 15% saying they will continue to build on SharePoint over the next few years. This is clearly an indicator that SharePoint remains an integral part of the organizational and operational strategy for many organizations. Couple this with the 10% who show they will now move to SharePoint 2016, and the message is clear: in the minds of these respondents, SharePoint is here to stay for some time. (Figure 32) The real question is how well prepared are they to move forward and grow their SharePoint systems?

Figure 32: Which of the following best describes your likely strategy for SharePoint? (N=136)

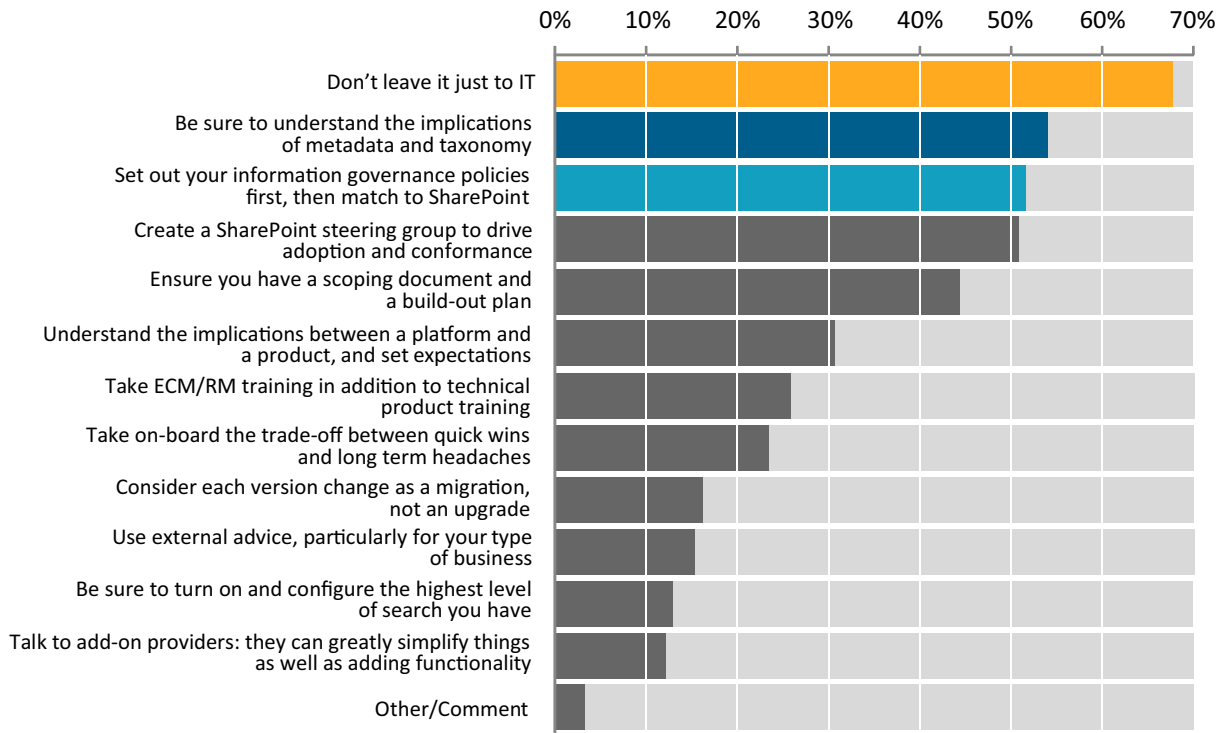


Lessons Learned

Considering the experiences shared by our respondents, we asked them to identify all of the applicable lessons learned as a result of their SharePoint projects. A resounding number (68%) said that SharePoint projects should not be left to IT, an indication that while IT is an integral part of implementing SharePoint, it should be viewed as a team effort consisting of cross functional members. (Figure 33)

Taking technology out of the discussion, 54% say that there is a need to know and understand the implications of metadata and taxonomy, and 52% say to put IG first then apply SharePoint, supporting the premise that information should be organized and governed in place before trying to add technology, as technology alone is not the solution to information management issues. (Figure 33)

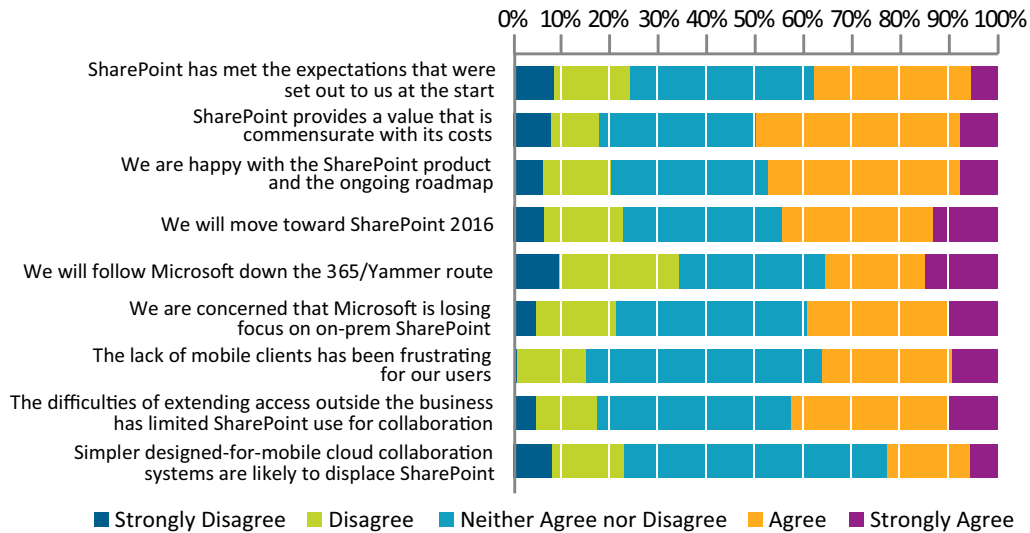
Figure 33: What are the key lessons have you learned from your SharePoint implementation? (N=124)



Opinions

When it comes to meeting expectations of SharePoint and the Microsoft roadmap for the future, 40% are happy and 15% very happy with what they have and what they see on the Microsoft road ahead. Likewise, 42% agree and 8% strongly agree that SharePoint provides good value to cost. (Figure 34)

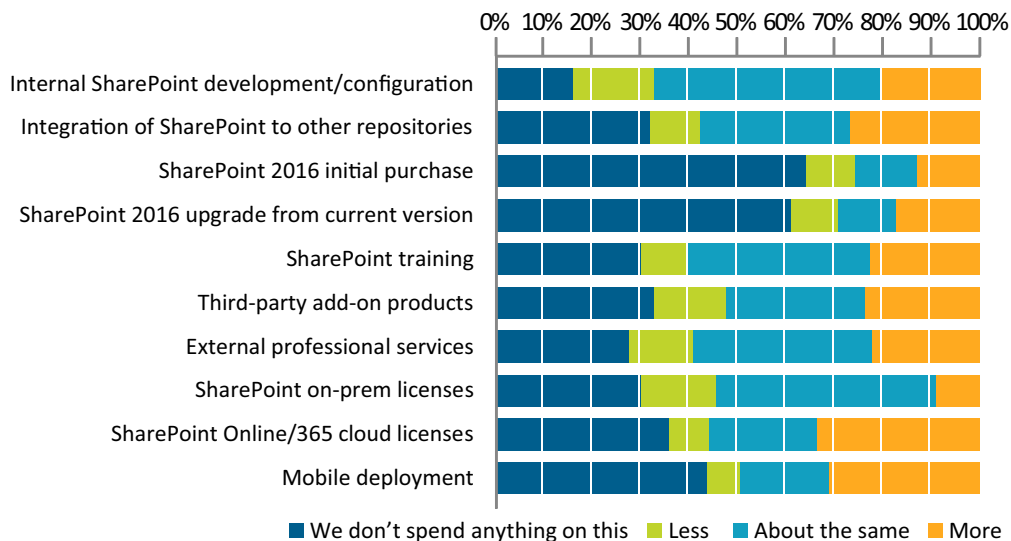
There is also general agreement still, that both the lack of mobile support and the difficulties of external access have been frustrating, and that SharePoint is under threat from designed-for-mobile cloud collaboration products and services in the future. Indications here being that of a growing need to support business interactions with the mobile workforce, partners, and suppliers beyond the corporate walls.

Figure 34: How do you feel about the following statements? (N=124)


While SharePoint may appear to be weak in the areas of mobile device use and external access, a hybrid approach could address some of these concerns as would the use of add-on products intended for these specific purposes with SharePoint.

Spend

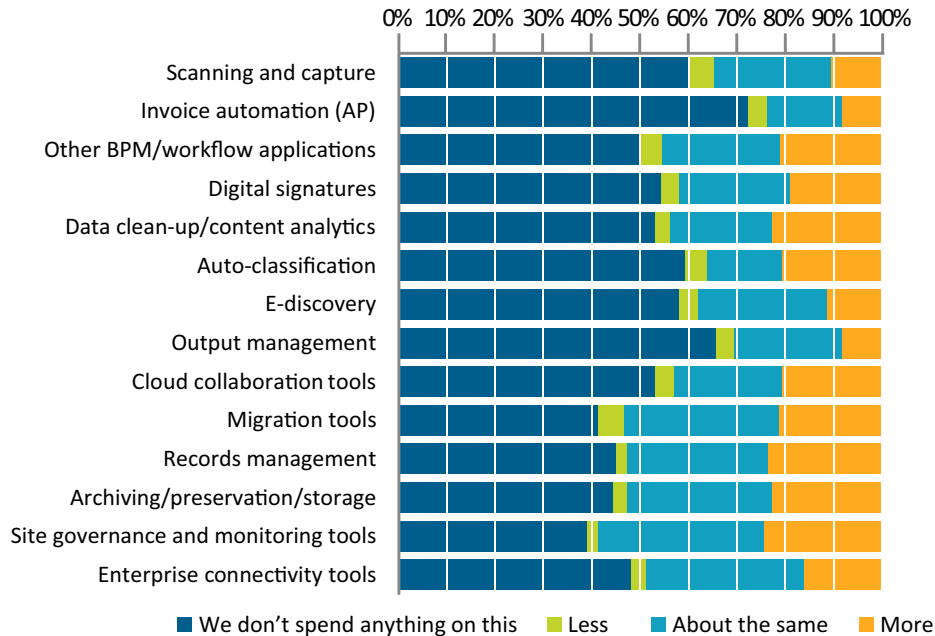
Unlike 2015 where respondents expected to spend more on external training, in 2016 our respondents say that integration with other repositories is the top area for increased spending (27%). SharePoint 2016 is the focus for 17% who indicate they will increase spending to upgrade, and 24% who say they will increase their spending for add-on products, indicating an effort to optimize and improve SharePoint use and extend its capabilities. (Figure 35)

Figure 35: How do you think your organization's spending on the following areas and applications in the next 12 months will compare with what was actually spent in the last 12 months? (N=139)


Add-on Spend

When it comes to specific add-ons, 24% of our respondents say they will increase spending on site governance, monitoring tools, and records management. Additionally, 23% say they will increase their spending on archiving, preservation, and storage, indicating that these organizations are realizing the importance of good IG practices and are making arrangements to move their organizations forward in support of risk management and compliance. (Figure 36)

Figure 36: How do you think your organization's spending on the following add-on products and applications in the next 12 months will compare with what was actually spent in the last 12 months? (N=139)



Emphasis should be on developing better-aligned information management practices in relation to governance, preservation, and records management, with an ability to monitor the SharePoint environment for on-going continuous improvement.



Conclusion and Recommendations

While some may have counted SharePoint out in relation to ECM/DM, it is obvious that it is here and fairly strong in many organizations. While it has not displaced the legacy systems, it is positioned to co-exist in ways that leverage existing IT investments with opportunity to extend beyond the corporate walls through inherent or add-on means. It is also obvious that a lack of awareness exists within the user community regarding the capabilities of SharePoint. Regardless of the reason, whether it be a lack of or poor communication on the part of Microsoft, or that the user community is content to follow the roadmap as presented by Microsoft, opportunities to optimize SharePoint and maximize return-on-investment is unrealized.

It is also unfortunate that many organizations continue to find themselves in a state of struggle when implementing SharePoint. However, all indications suggest that initially, it is not the fault of the technology, but failure of the organization to properly address information governance prior to implementing the technology. SharePoint will not automatically organize information in ways that meet compliance requirements, as it is not and cannot be aware of the requirements. It is the human element of a SharePoint environment that must know and understand the rules, set up the framework for the organization and then align SharePoint to support those requirements and policies.

So are users deserting SharePoint at the rate some might want us to believe? The answer according to this survey is no, and in fact, many are considering incorporating the next generation of SharePoint, SharePoint 2016. More than half of those we surveyed are committed to building and extending SharePoint with a strategic focus for quite a while yet. For many, it will be a team effort, not an IT only project, leading us to believe that there is serious consideration now being taken in relation to establishing a solid information ecosystem, built within a well-defined framework, and aligned with SharePoint as a primary user portal.

The indicators are clear that SharePoint can be – and for many today, is – a platform upon which ECM, DM, RM, and collaboration can be built, implemented and expanded. Do not rely solely on the technology. Establish and enforce strong IG policies and processes. Seek guidance and expertise to fill in those areas where your organization is weak. Most of all, keep things moving.



Recommendations

- *If your SharePoint deployment is stalled, or failing to add new value, identify the reasons and develop a plan of action to resolve them.*
- *Confirm with Senior Management what role SharePoint plays in the organizational strategy for ECM, DM, RM, and collaboration, then focus on those areas. Plan and budget for training and system enhancement.*
- *While technology training is needed for your users, do not discount the benefit from more generic training in content and records management practices. This will help correct previous mistakes with content classification, metadata and taxonomies and better position your organization to align with SharePoint.*
- *Develop or refine your information governance (IG) framework, and use this to see where you have gaps in your SharePoint capability, particularly with regards to records management.*
- *Look for ways to integrate important emails into SharePoint, incorporating auto-classification to simplify user requirements.*
- *Evaluate access to SharePoint remotely or from mobile devices and look for ways to enhance this capability. This may be an important driver for a move to the cloud, most likely in a hybrid model that retains some reassuring on-premise security.*
- *Link SharePoint to your other enterprise systems, allowing greater accessibility to enterprise information and simplifying business processes that involve both transactional and unstructured content.*



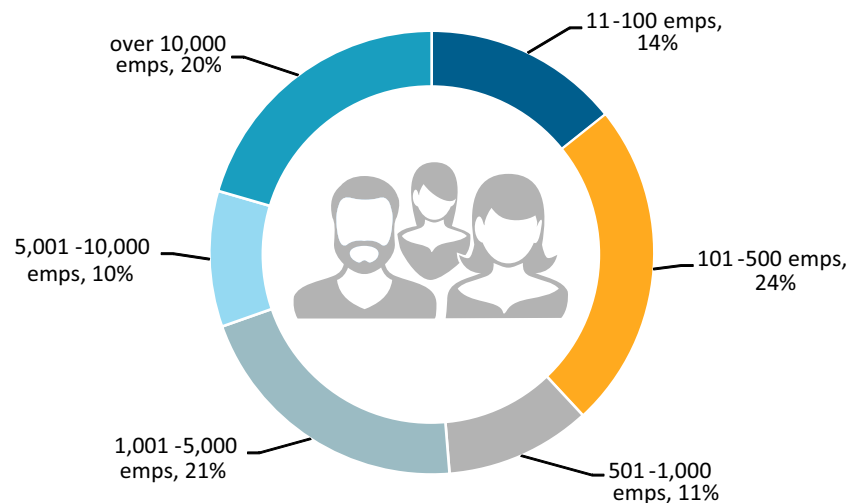
Appendix 1: Survey Demographics

Survey Background

The survey was taken using a web-based tool by 274 individual members of the AIIM community in June of 2016. Invitations to take the survey were sent via email to a selection of the 195,000 AIIM community members.

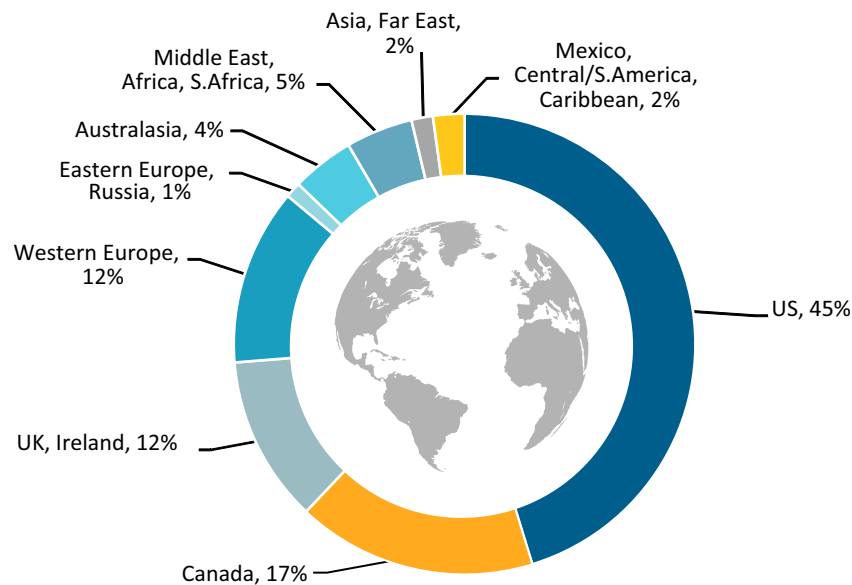
Organizational Size

Survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 30%, with mid-sized organizations of 501 to 5,000 employees at 32%. Small-to-mid sized organizations with 10 to 500 employees constitute 38%. Respondents from organizations with less than 10 employees have been eliminated from the results.



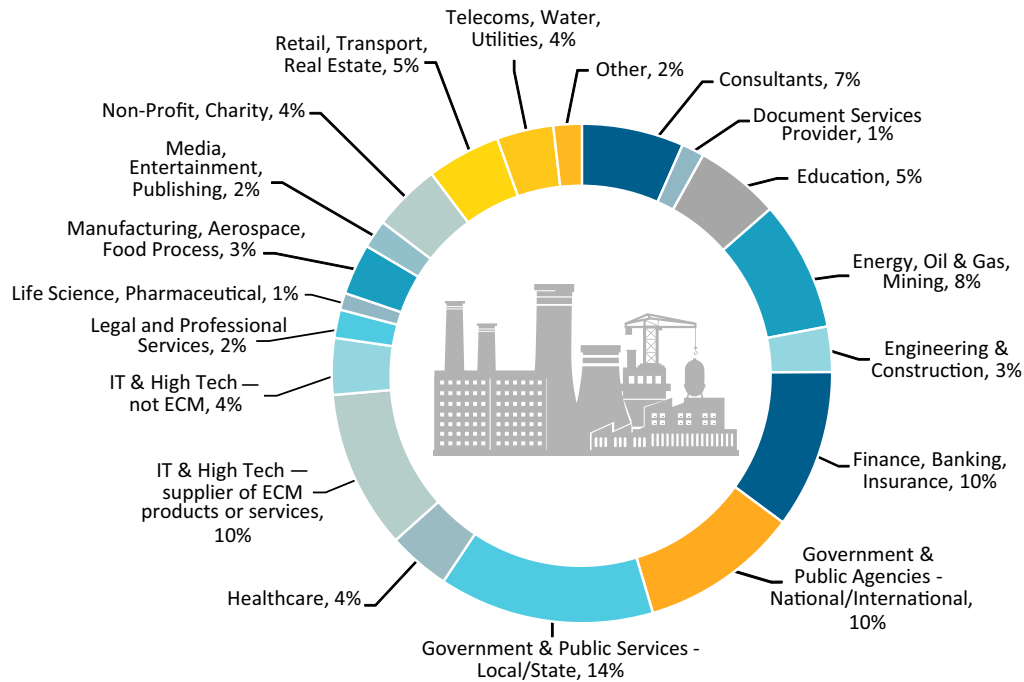
Geography

62% of the participants are based in North America, with 30% from Europe, Middle East, Africa and Russia (EMEA-R), and 8% rest-of-world.



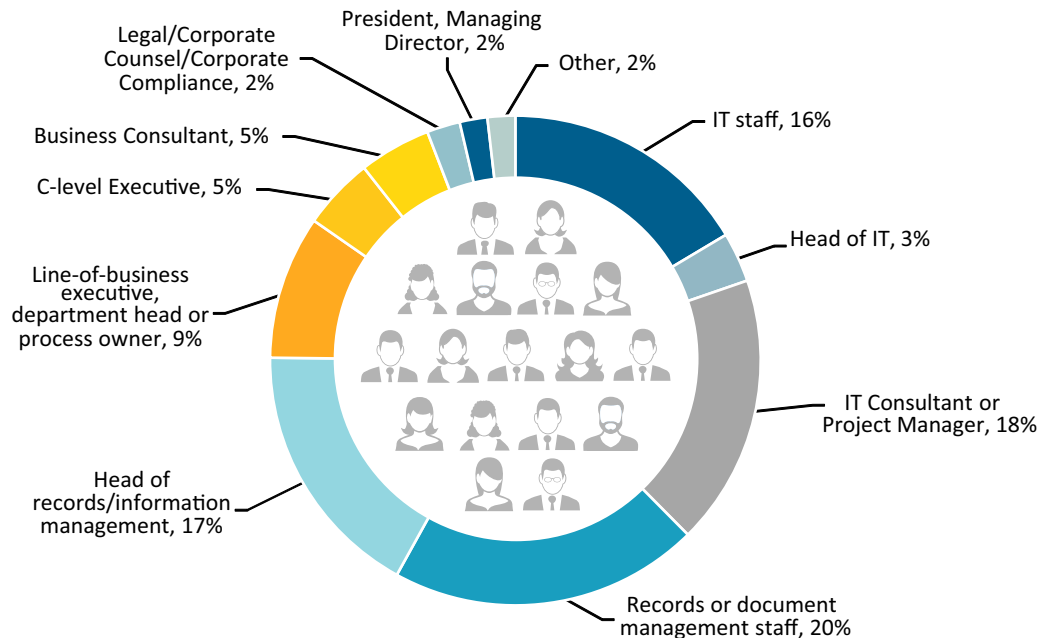
Industry Sector

Local and National Government together make up 24%, and Finance and Insurance 10%. Energy, Oil, Gas, and Mining make up 8% of respondents. Suppliers of ECM services have been included as their responses are in alignment with other IT and High Tech. Other sectors are evenly split.



Job Roles

19% of respondents are from IT, 37% have a records management or information management role, and 16% are C-Level, President, or line-of-business managers.





Appendix 2: General Comments

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

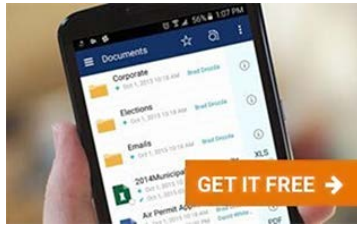
- *The deployment of SharePoint depends on HR, Communications and other areas. Not IT.*
- *It has been a long and rocky road – but we are seeing some light at the end of the tunnel.*
- *This survey is very thought provoking. I know our SharePoint implementation has been flawed, but seeing it here in my answers makes me realize how far we have to go.*
- *I feel that the expertise to launch this type of platform hasn't been available for my organization.*
- *Users are not happy about the lack of mobile app and also lack of copy/move functionality and those two facts are undermining our project.*
- *In a dysfunctional organization such as ours, I've been amazed what an individual or small group of forward-thinking people can do.*
- *SharePoint has been awesome since I started using it in 2009. It has been a mountain to climb getting adoption in my organization because of complexity of SharePoint and not being fully available outside the organization. Other cloud solutions have given SharePoint a run for its money.*

Underwritten in part by



www.colligo.com

Colligo Engage is the essential mobile content management platform for Microsoft SharePoint, Office 365, and OneDrive for Business – empowering every worker to access and contribute to corporate information in any content store, on any device, from any location.



Colligo Briefcase

Get reliable access to SharePoint with Briefcase apps for iOS, Android, Windows and Mac clients. View, edit and save files including metadata on any device, online or offline, automatically syncing back to SharePoint when connected.



Colligo Email Manager

View, tag, file emails and attachments in SharePoint with apps for Outlook (and iOS is coming soon). Bring business content to where your users work to boost productivity and classification of email records.



Colligo Console

Colligo Console is your IT control center. Built on Microsoft Azure, it tracks user activity in a secure cloud platform. Configure users and settings. Push content and policies to devices, then monitor dashboards for compliance.

The award-winning Colligo Engage suite is used by over 5000 organizations every day for email management, document distribution, and mobile collaboration. Get 5 for FREE at www.colligoapp.com/#signup!



www.gimnal.com

About Gimnal

You want to consolidate on SharePoint as your platform for enterprise content and records management to improve information governance. You want connectivity between your SharePoint and SAP platforms. We created our products to help you achieve these goals. Gimnal products enable organizations in any industry to standardize on SharePoint as a powerful content platform for building and deploying rich solutions that satisfy many diverse business requirements.

Gimnal software transforms SharePoint and Office 365 into a true enterprise content management solution. Gimnal software offerings for SharePoint include Gimnal Governance & Records Management, Gimnal Intranet & Portals, and Gimnal ECM for SAP Solutions. To make the most out of their investment in SharePoint, organizations look to third-party add-on technology to deal with the challenges of improving user experience and adoption, achieving greater governance and compliance, and extending the usability of SAP content. Gimnal customers want a single platform, not a collection of disparate point solutions to solve overarching information management problems. Gimnal products work alone or together to deliver value in SharePoint and SAP environments.

We work with our clients and partners to address the challenge of unmanaged content in shared drives, collaboration systems, the cloud, and outdated enterprise content management systems. Gimnal's proven solutions for intranets and portals, information governance, and SAP interoperability reduce risk and costs compared to other third-party solutions or costly customization. Our business applications are supported by the knowledge of our expert team, who work with our customers and partners to deliver solutions for SharePoint and Office 365 on premises, in the cloud, or both.

You've just downloaded and read the latest AIIM Industry Watch Report on SharePoint. **What now?**



Take your skills to the next level by learning how to understand records management components and features, build an information management policy, identify ways of capturing records, understand records retention, and manage records in-place with AIIM's **SharePoint** training course.

Learn more, visit: www.aiim.org/training



The Global Community of
Information Professionals

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

© 2016

AIIM

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

AIIM Europe

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