

AIIM Market Intelligence

Delivering the priorities and opinions of AIIM's 80,000 community



Industry Watch

Connecting and Optimizing SharePoint

– important strategy choices

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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 422 individual members of the AIIM community between Dec 19 2014, and Jan 14, 2015. 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 1. Graphs throughout the report exclude responses from organizations with less than 10 employees taking the number of respondents to 409.

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.

About the Author

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Introduction

SharePoint (SP) has been with us for nearly fourteen years now. At the outset it was an intranet platform for building websites. It allowed project teams to collaborate, make announcements, exchange documents, and share calendars. Each new release at three-year intervals added new capabilities to the platform, particularly in the areas of document and records management. Having coined the term ECM (Enterprise Content Management) in 2002, AIIM were pleased to see Microsoft use it to describe major elements of the SharePoint capability. Whether out-of-the-box SharePoint is a true ECM system remains a moot point, but it has certainly been the vehicle that took content management across the enterprise, spreading out across organizations large and small, well beyond the restricted license base of earlier systems.

And yet user adoption has always been something of an issue. Despite having ready access to SharePoint, many users cling to their file-shares, or more recently, adopt other ways of collaborating and sharing documents via web-based services. A third of the organizations we surveyed feel that their SharePoint project has struggled to meet their original expectations, and a further 26% feel progress has stalled. Is this because of poor training and governance, restricted functionality of SharePoint, or simply the inevitable result of being the first ECM system to move beyond the safer boundaries of compliance-based operations? As we will see in this report, it is likely to be a combination of all of these.

However, only a very small number of users – less than 8% - are considering replacement with an alternative product, and only 1% have actually done so. For most there is a strong commitment to making SharePoint work for them as a core platform, embedded in and connected to the enterprise. Many are working more strongly within a new information governance framework, adding third-party add-on products to remediate existing data, and to fill the functionality gaps, particularly for workflow, metadata management and collaboration. Many are also looking at the 365 cloud options to improve access from mobile, and for collaboration with external partners. And a strong overall theme is training, customization and auto-classification to improve both user acceptance and on-going data quality.

Key Findings

- **Adoption Issues and Forward Strategy 26% of respondents report that their SharePoint project has stalled, and 37% have struggled to meet their original expectations, a total of 63% with sub-optimum installations.** 37% are moving forward, but only 11% feel their project has been a success.
- **A failure of senior management to endorse and enforce SharePoint was the biggest reason for lack of success, followed by inadequate user training and a general lack of planning.** User resistance and a lack of investment and expertise are also quoted.
- **53% are still seeing an increase in active users.** 23% have reached an adoption plateau, or are facing user adoption issues (15%). Only 3% have reducing numbers.
- **The key lessons learned are don't leave it to IT – form a SharePoint steering group. Be sure to understand the implications of metadata and taxonomy.** 50% suggest building an IG policy first and then matching it to SharePoint.
- **25% are committed to building their ECM, RM and collaboration around SharePoint. For 22% it remains their ECM system of choice for the foreseeable future, and 28% will stick to it for the next few years – in total, 75% remain committed.** Only 8% are looking elsewhere right now.
- **At 42%, SharePoint 2010 is still the most popular live version. 22% are live on 2013.** Regarding cloud, 6% are live on 365/Online, with 18% rolling out.

Cloud

- **43% are happy with Microsoft's product roadmap, but 49% are concerned about loss of focus on the on-prem version.** 20% feel SharePoint is under threat from more modern cloud systems. Lack of mobile support and difficult external access has frustrated 35%.
- **For the future, 34% plan to move to SharePoint 365/Online for all (7%), most (10%), or some (17%) of their content.** Of the remainder, 15% plan to use private cloud (11% as hybrid), 14% will stay on-prem, and 36% are undecided. This represents a near doubling of cloud intentions since our last survey in 2013.

Add On Products

- **15% use standard out-of-the-box SharePoint, and 39% have only limited customization.** A third use in-house or externally developed customization, and 36% use third party add-on products.
- **Workflow and BPM is the most popular add-on, followed by metadata and taxonomy management, collaboration tools, search enhancement and Outlook integration.** Migration tools and system health monitoring are also popular.
- **Only 7% currently have automated or assisted classification, but a further 28% plan to implement in the next 12 to 18 months.** Along with data clean-up tools, and digital signatures, this is by far the biggest rate of increase across add-on products.

Integration

- **Only 14% have SharePoint connected to other ECM/DM systems. 13% have connections to the CRM/Service Desk, and 12% to project management systems.** Less than 10% have connections to ERP or Finance systems.
- **15% use SharePoint as their search and access portal across other repositories, but 44% are planning to go that way.** Aligning governance, security and metadata is given as the biggest problem.

Information Governance

- **For 23%, SharePoint can match their records management needs (with careful set up), 15% are using specialist customization, and 16% use 3rd party add-ons.** 17% have a dedicated RM system but most (12%) are not connected to SP. 29% do not differentiate between records and other content.
- **48% still have work to do to align SharePoint with their IG policies, and 19% are not aligned at all.** The biggest misalignments are with legal discovery, metadata and retention/disposition.

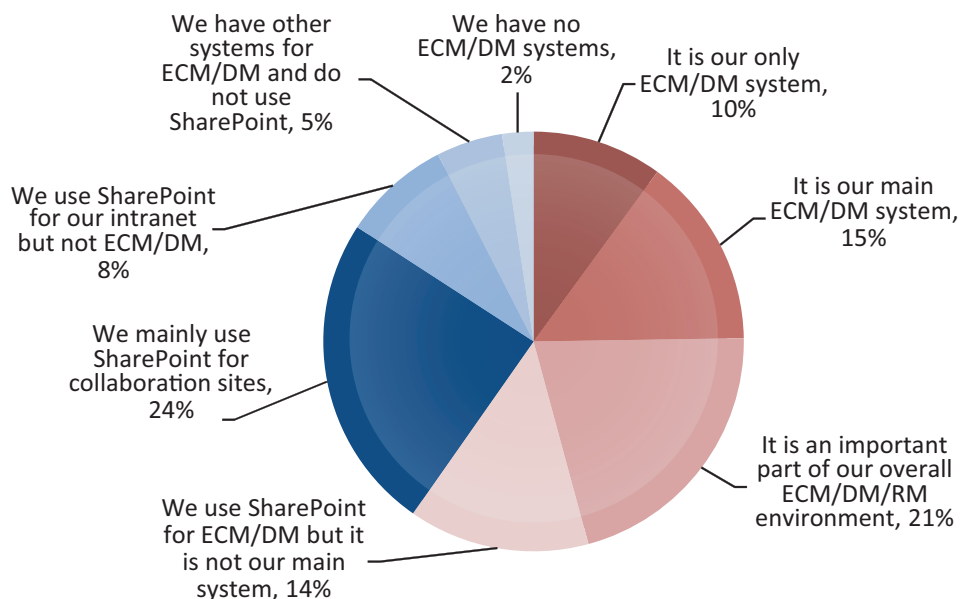
Spend

- **Many of our respondents expect to spend more on SP Online/365 licenses, and on mobile deployment.** A small number expect to increase spend on training and professional services - despite the good intentions expressed regarding re-energizing projects.
- **A strong net demand is indicated across a wide range of third-party add-ons,** including site governance and monitoring, records management, BPM, digital signatures, connectivity, cleanup and auto-classify.

Utilization and Versions

Beyond its original use for intranets and collaboration, we have seen a steady increase in the number of organizations using SharePoint for ECM or document management (DM), from 48% in 2012 to 60% now, although the number considering SharePoint to be their main or only ECM/DM system has stayed fairly consistent at 25%. For smaller organizations (10-500 employees), this number rises to 38%, with 22% considering it to be their only system. Only 4% of the largest organizations (5,000+ employees) have SharePoint as their only system, although a further 12% consider it to be their main system, and for 25% it forms an important part of their ECM/DM environment.

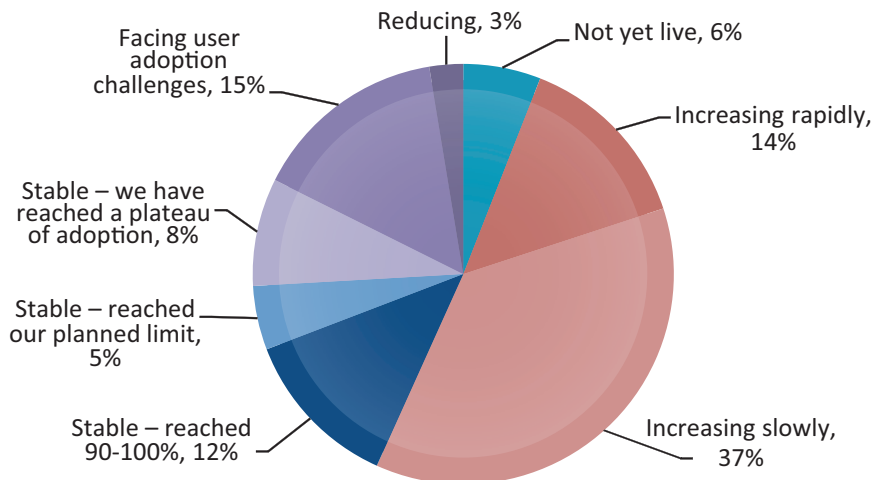
Figure 1: How would you describe the use of SharePoint as an ECM/DM system across your organization? (N=409)



Reach

Although the pace of new user adoption has slowed since our 2013 survey, 14% of our responding organizations are still seeing a rapid increase in adoption, and 37% a slow increase – a total of 51% with increasing take up, rising to 60% for mid-sized organizations. Across all organizations, 23% have reached an adoption plateau or are facing user adoption challenges, but only 3% are seeing a reduction in use. 12% have reached true “enterprise status” with nearly all of their office staff using SP.

Figure 2: How is the proportion of your office staff actively using SharePoint changing? (N=409)

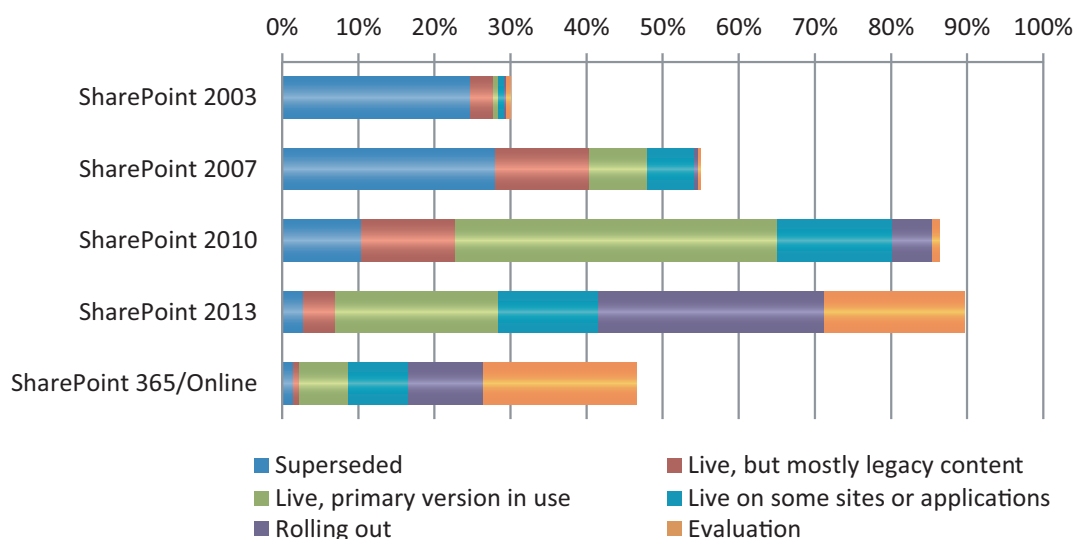


Versions

As we will see later, many users have customized SharePoint to a greater or lesser degree, and this can make updating to the latest version somewhat difficult. In addition, many users realized that their original structures (if they ever had them) needed to be re-engineered in order to make the most of new features. It is no surprise, therefore, that SharePoint 2010 is still the most popular live version at 42%. The much-enhanced 2013 version has 22% live, with 43% making moves in that direction.

Despite Microsoft’s efforts to move people in the direction of the cloud, only 6% are live on the 365/Online version of SharePoint, although a significant 18% are in the process of rolling it out, and as we will see later, the majority of users see themselves going that way in due course.

Figure 3: What is the status of the following SharePoint versions in your organization? (N=404)



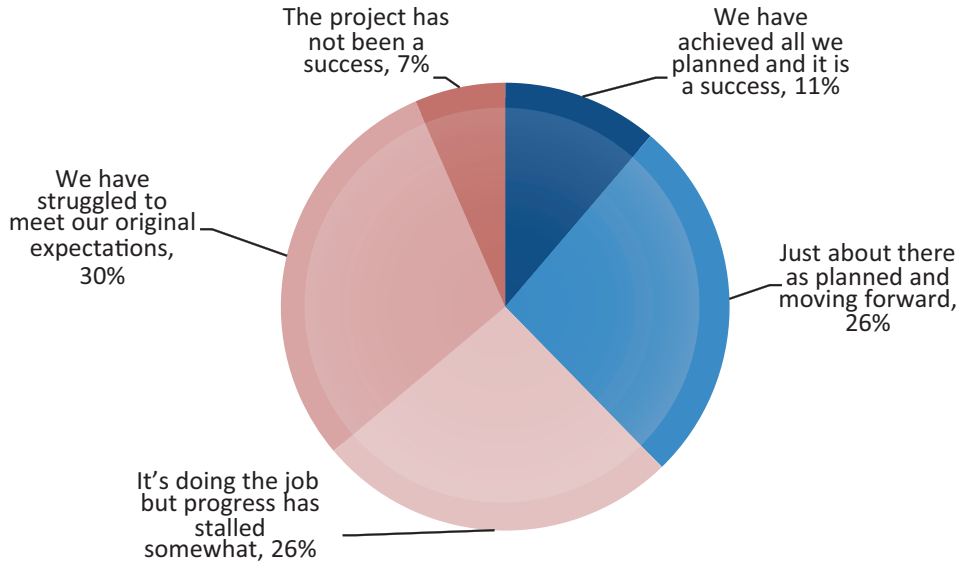
For many organizations there is not a “single SharePoint system,” as 50% are supporting two or more live versions. This is an increase from our survey two years ago where 38% were supporting two or more. 14% of all organizations support three or more versions, rising to 17% of larger organizations. This inevitably adds to the load for the support department, and restricts the ability to move to the cloud even if the wish is there.

Project Success

As we mentioned earlier, most “enterprise” projects suffer from high expectations and low outcomes, but SharePoint seems to be particularly prone to poor initial planning and increasing complexity, compounded by a lack of user training, and a general lack of willingness to give up the relative freedom of file shares and personal folders.

The good news is that compared to our survey in 2013, the number of organizations reporting a successful SharePoint project has increased from 6% to 11%, but this is more than matched by a corresponding decrease in those who are still moving forward from 34% to 25%. An increase in those struggling with their projects from 33% to 37% paints an overall picture that is not as good as it should be. A further 26% feel their project has stalled somewhat, such that overall, 63% have cause for some dissatisfaction.

Figure 4: Thinking about the scope and development of your SharePoint ECM project, how would you best describe progress? (N=321 with live projects)

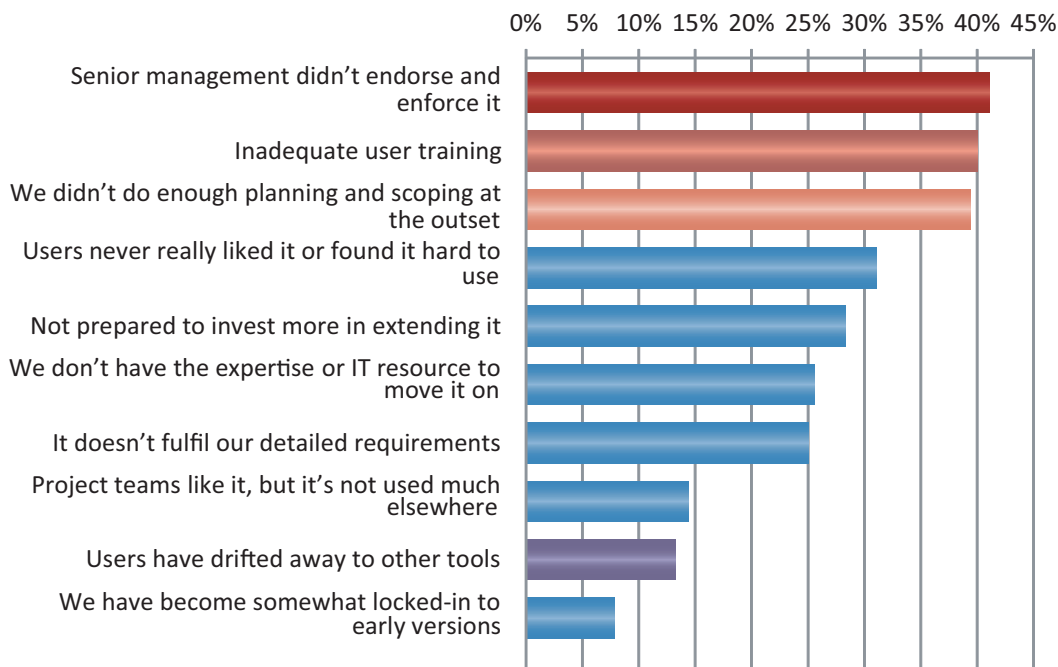


Reasons for Failure

Our respondents gave us many different free form comments: “Our only plan is to deploy SP. We don’t tell people how to use it, how to organize their content, or set metadata standards,” and “We have attempted many pilot projects, but have always fallen short of user needs/expectations. However, we fall less short each time and are getting close to an acceptable DM solution.” Along the way, a common theme is, “it is a system owned by IT. They are implementing without a business needs assessment.”

When constrained to a choice of answers, the picture that emerges is one with no endorsement from senior management, inadequate user training combined with a difficult user interface, and not enough planning and scoping at the outset.

Figure 5: Which of the following reasons would best apply to why your SharePoint project is stalled or failed? (N=180 with stalled or failed projects)

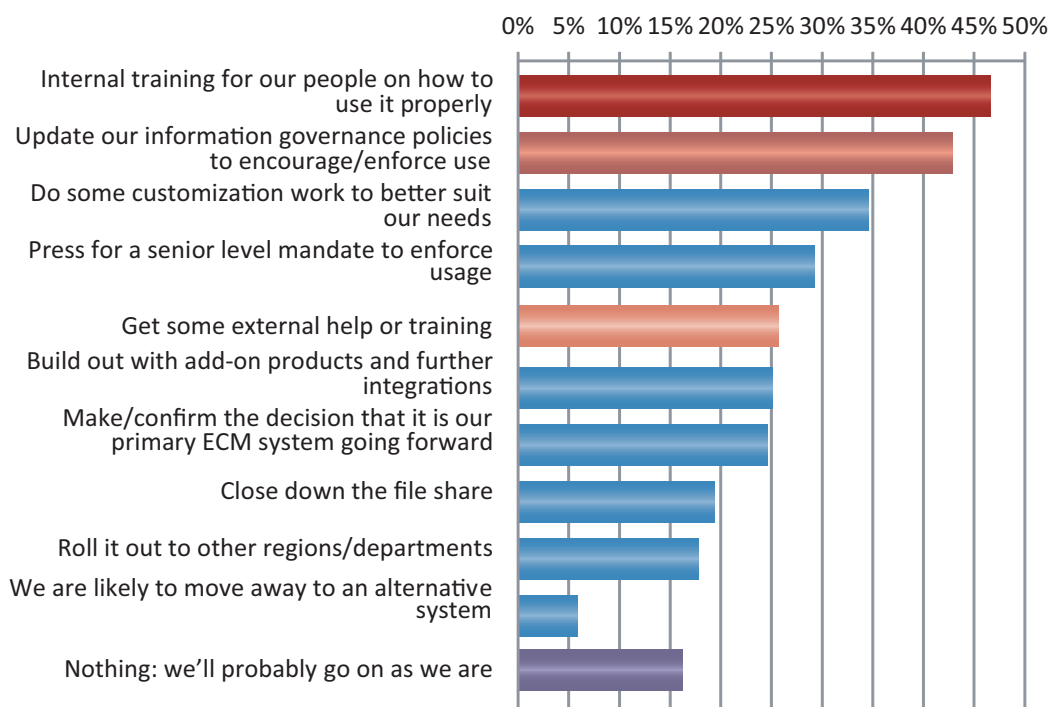


A small but significant 13% note that their users are drifting away to other tools, and this is probably an understatement given the known use of Dropbox, Box, Google docs, etc.

Going forward, most respondents took a positive view of what could or should be done, although 16% seem to be resigned to the status quo as per this comment, “I would press for nearly all of these actions; however, with no leadership support, we’ll go on as we are for the foreseeable future.” Internal and external training figure strongly as ways to improve adoption, and there is a view that the increasing emphasis on information governance policies will provide a degree of encouragement to users. 35% are looking at customization to improve the fit with their business, and 25% plan to build out the functionality with third-party products.

Although 29% will press for a senior level mandate to enforce usage, perhaps along with a firm decision that SharePoint should be the primary ECM system, it seems likely that they will have to await some compliance disaster or other business trauma before senior management acknowledge the need to have robust and consistent content and records management. It may be a further indication of the apathy at this level that only 6% have plans to move away to another system.

Figure 6: What steps are you taking to re-energize your SharePoint deployment?
(Check all that apply) (N=191 with stalled or failed projects)



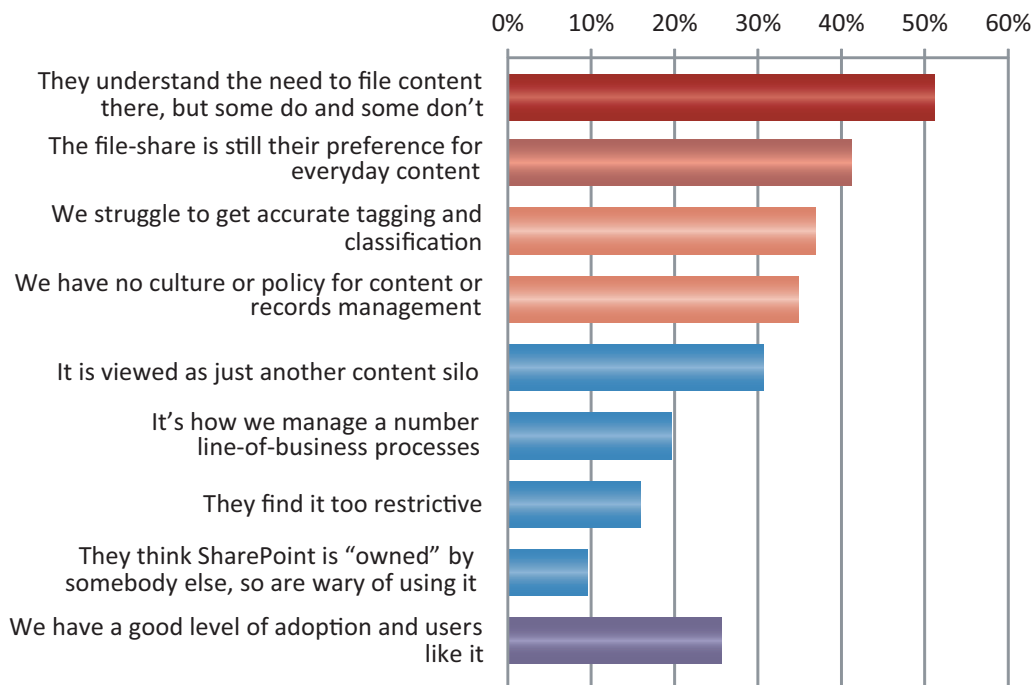
63% of SharePoint deployments are stalled or struggling to meet expectations. The main reasons given are lack of support from senior management, inadequate user training, and poor upfront planning. Most respondents are optimistic that the situation can be rectified, and are not looking to replace SharePoint at this stage.

User Perceptions

When we looked in more detail at the way users actually utilize SharePoint, particularly in the areas of content and document management, the two most common factors (Figure 7) are that usage is very patchy, and the file-share is still the preference for everyday work-in-progress. We know from other surveys that less than 10% of organizations have actually turned their file-share off. A general lack of content management or records management culture also impacts SharePoint usage, and an obvious result is a lack of enthusiasm for tagging and classification, although many would say the same always applied to paper filing.

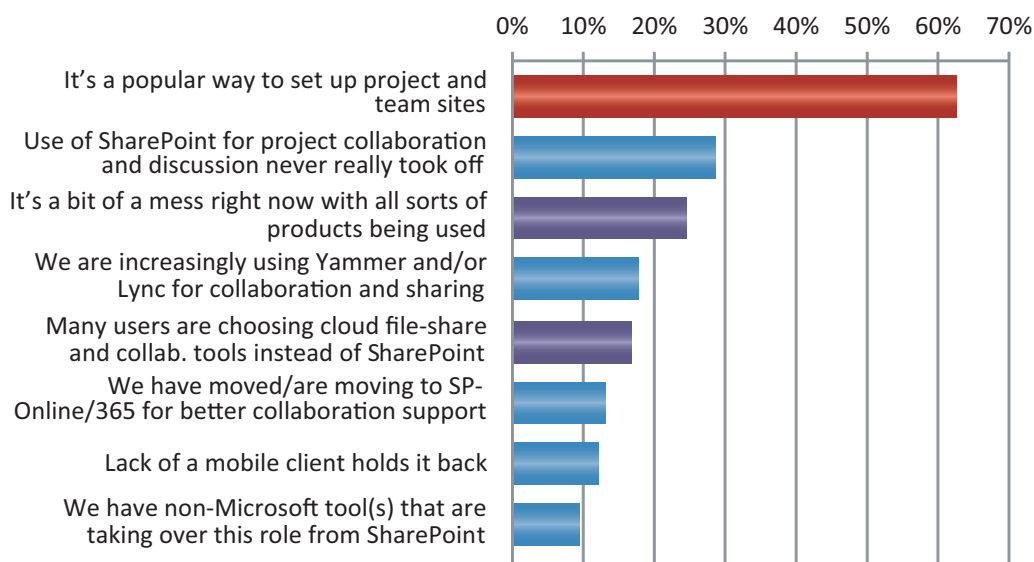
The picture is not all black, and a quarter of our respondents report a good level of adoption and that users like using it.

Figure 7: From the ECM/DM point of view, how would you describe the way your users consider SharePoint? (Check all that apply) (N=301 live on SharePoint)



As we mentioned earlier, SharePoint's strongest play is in collaboration and content-sharing, and as we can see from Figure 8, it is a popular tool for project teams. But this is also the area where it has come under recent pressure from competing cloud-services and social business products. Microsoft's acquisition of Yammer was always an admission that SharePoint lacked flexibility in this area, although as we can see, only 18% of our respondents are using Yammer compared to the 17% of users choosing their own cloud tools, and the 25% where things are a bit of a mess, with all sorts of products being used. 13% see SP Online/365 as a way to provide improved collaboration within the SharePoint environment.

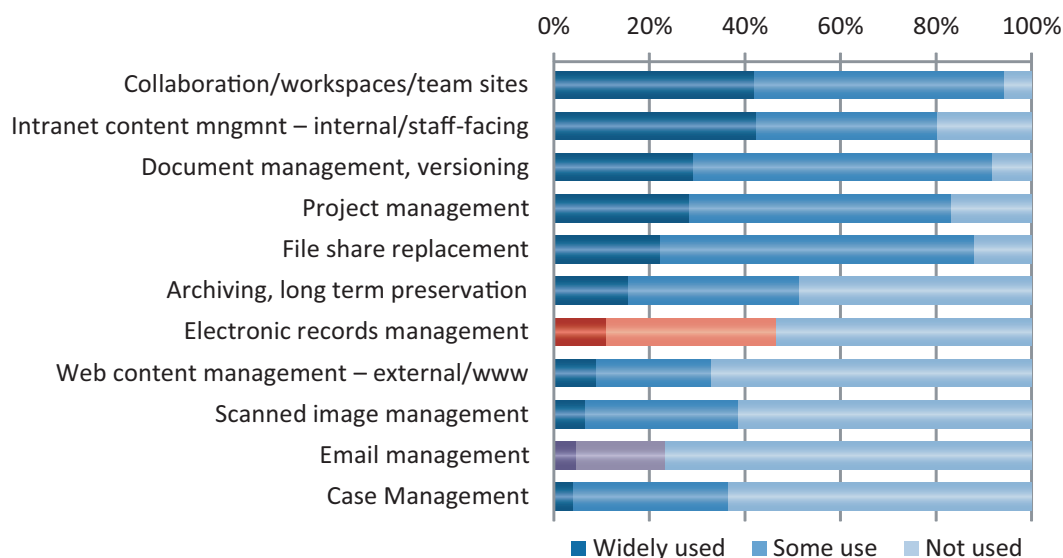
Figure 8: From the collaboration and content-sharing point of view, how would you describe the way your users consider SharePoint? (Check all that apply) (N=297)



Usage

SharePoint is often described as a multi-purpose platform, and this is reflected in the range of usage across different functionalities. 42% have widespread usage in workspaces and intranet, but dropping to 11% for records management, although a further 36% have some records use. A telling point is that only 24% make any use of SharePoint for email management, with only 5% having universal use. Having said that, the disconnect between SharePoint and Outlook, Microsoft’s popular mail client, has always seemed somewhat frustrating – and as we will see later, some third-party add-ons have addressed this. Out-of-the-box SharePoint is also considered to be poor for case management, although the 36% who make some use of it may well have add-on products or customization.

Figure 9: How would you describe your use of SharePoint in the following content management areas? (N=307)

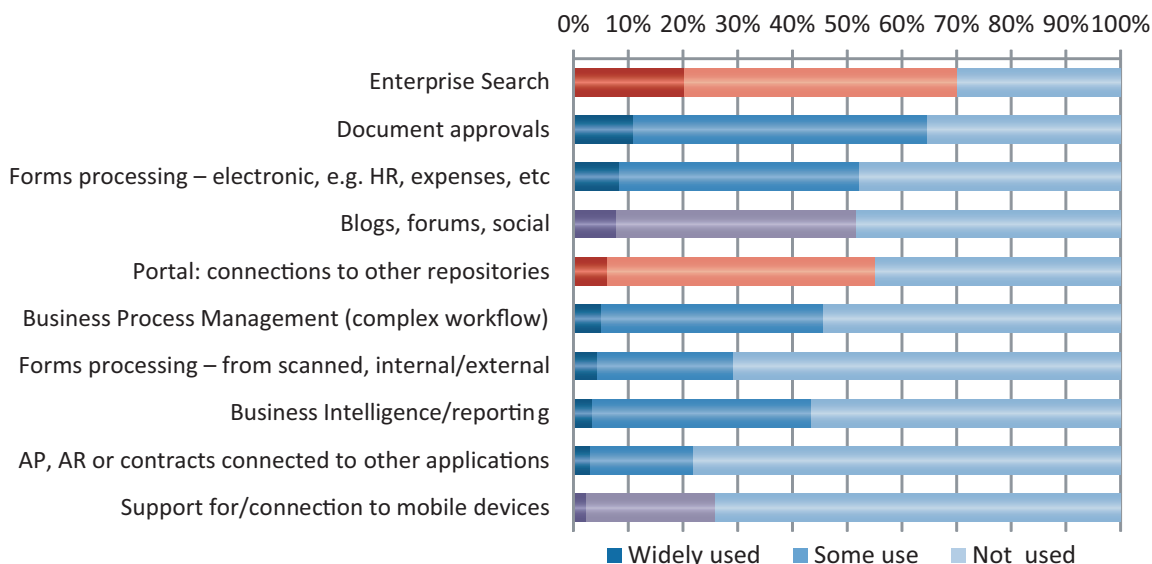


Process and Connection

In Figure 10 can see that 20% have enterprise search set up through SharePoint, although a further 50% make some use – probably reflecting more about the state of enterprise connectedness than the search capability in SharePoint. As we will see later, the same applies to the use of SharePoint as a single-point access portal.

52% are using blogs and social functions to a degree, although only 8% are making wider use – perhaps the difference between local blogs on project sites, as opposed to company-wide intranet extensions. A similar gap exists for mobile device support, with only 2% having wide access, but 24% making some mobile access available.

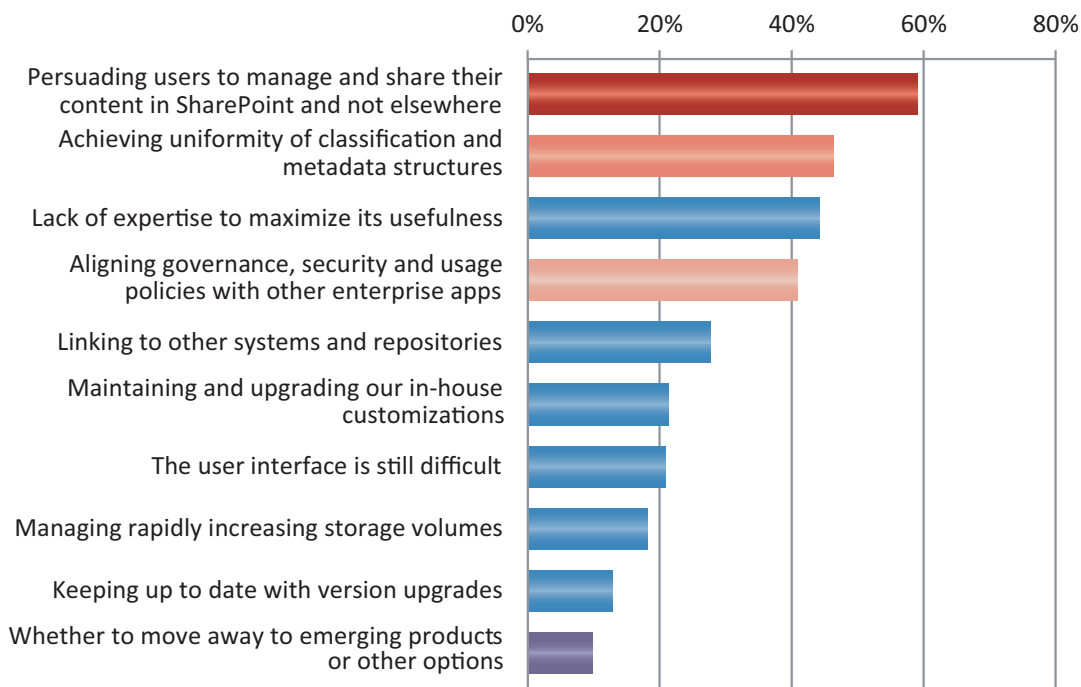
Figure 10: How would you describe your use of SharePoint in the following process management and enterprise connection areas? (N=304)



On-going Issues

60% of our responding organizations struggle to persuade users to manage and share content in SharePoint and not elsewhere, and this is the biggest on-going issue (59%). As we have seen, this is largely due to a lack of commitment from above, and the lack of content and records management culture, although SharePoint is not without its ease-of-use issues. The second biggest issue is the lack of uniformity across classification and metadata structures, and to a lesser extent, aligning governance and security with IG polices. There is also the issue of increasing complexity within the product, and a lack of expertise or support resource.

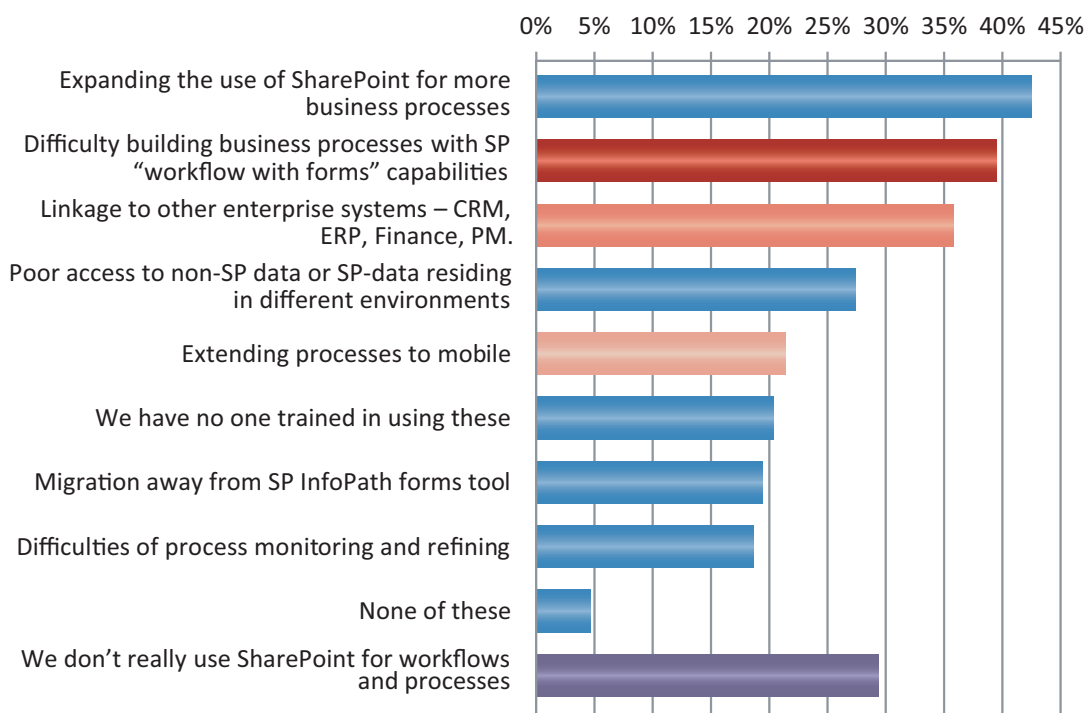
Figure 11: What are the biggest on-going issues for SharePoint in your organization? (Max THREE) (N=296)



Looking more specifically at workflows and processes, Microsoft have changed tack here a few times, and 40% of users are struggling with the “workflow with forms” function. They also have difficulties linking to other enterprise systems, especially where SharePoint data and non-SharePoint data come together. These difficulties do not help the overall expansion of SharePoint to more business processes, although add-on products in this area are popular.

Extending processes to mobile is already an issue for 21% and it is inevitable that demand will increase as more organizations adopt a mobile-first approach. Nearly 30% have no processes or workflows in SharePoint.

Figure 12: Do you have any of these issues with workflows and processes in SharePoint? (N=299)



Although popular for project and team sites, most organizations are failing to exploit SharePoint across its full breadth. User resistance is an issue for DM and RM functions and cloud-based alternatives are driving enhanced collaboration. Workflow and process management have always required an extra level of expertise, or an add-on product.

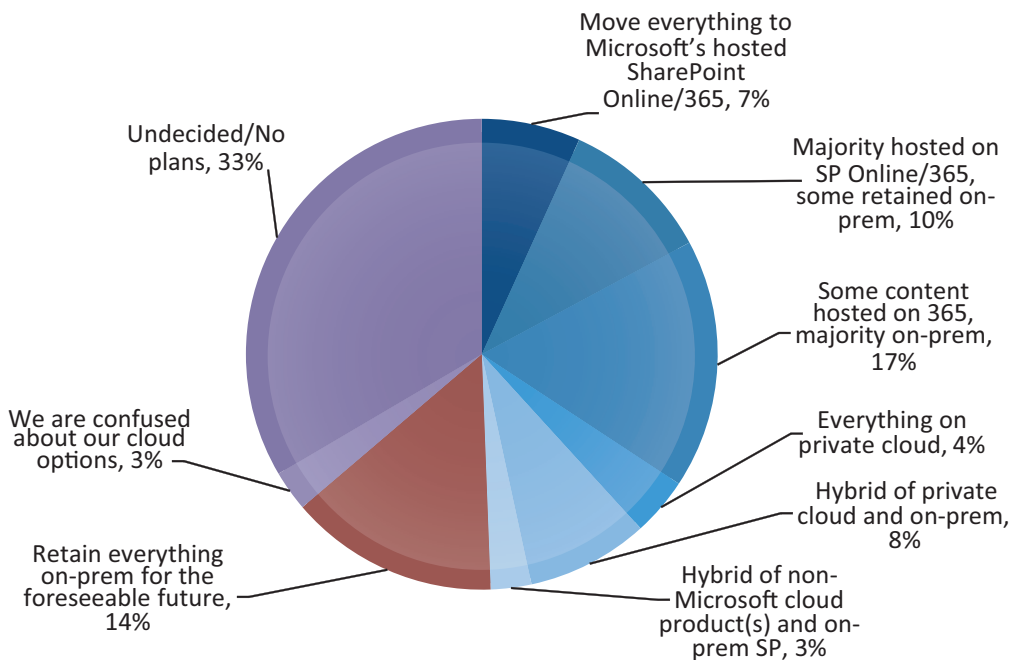
Cloud

As a browser-only product from day one, Microsoft has always been in a strong position to offer cloud-hosted SharePoint. However, in addition to the security issues which affect all cloud services, the heavy customization that many users undertook for SP2007 and SP2010 has played against the SaaS requirement to standardize the codebase, and Microsoft themselves have struggled to match functionality between on-prem and cloud versions. In addition, integration with third-party products, and interconnection with on-prem enterprise systems have caused considerable hesitation from users.

Having said that, the number of our respondents firmly grounded on-prem has reduced since 2013 from 24% to 14%, and those who are undecided from 43% to 33%. This could be considered a rapid change. In fact the net take up of plans in favor of SP 365/Online has actually doubled.

This is not all good news for Microsoft, as around a third of potential cloud adopters plan to provide their own cloud infrastructure, rather than use SharePoint Online/365, and this does allow them to retain existing customization. In both camps, only around 20% plan to put everything in the cloud as opposed to adopting a hybrid part-cloud, part on-prem model. Even amongst these, more than half would go for a majority on-prem model, putting only the more collaborative content in the cloud.

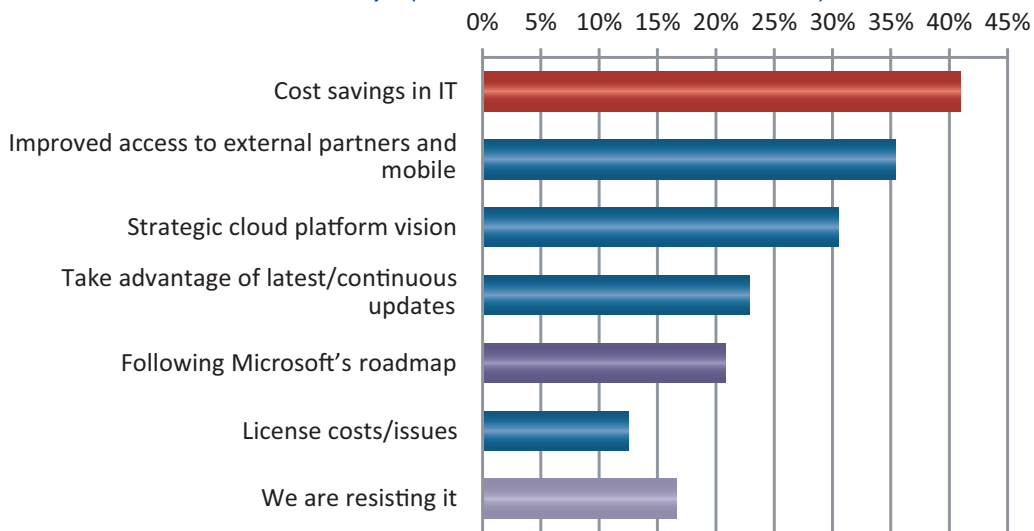
Figure 13: What are your plans for SharePoint in the cloud? (N=251, excl. 33 Don't Know)



Looked at across company sizes, smaller organizations are more likely to go completely cloud, both with 365/Online or private (17%), and the largest companies are the biggest supporters of a private hybrid of cloud and on-prem (16%). Mid-sized organizations are the more reluctant to make a decision as yet (47%).

The biggest driver for moving SharePoint to the cloud is cost savings in IT, followed by improved access for external partners and for mobile. Some 31% have a positive strategic direction to adopt cloud, compared to 21% who seem to be loyally following Microsoft's roadmap. This can be balanced by the 17% who are resistant to the idea - although perhaps this reflects the fact that not all of those in the IT department are so keen to achieve cost savings in IT!

Figure 14: If you are moving or planning to move to cloud/365, what is the primary driver? (Max TWO)? (N=144, excl. 120 Don't Know, N/A)



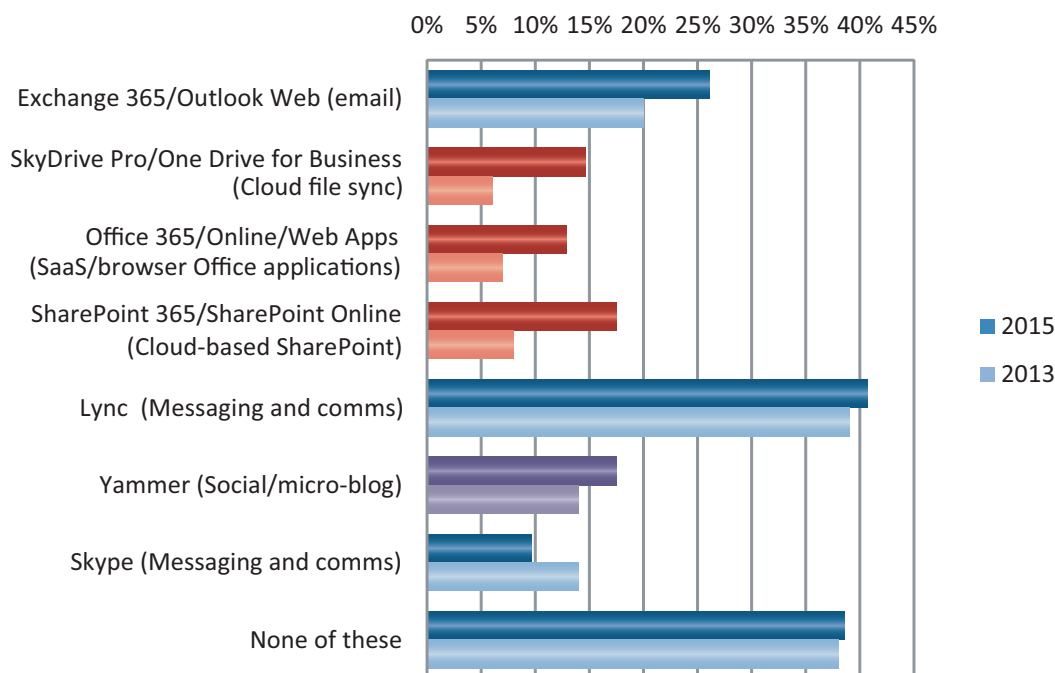
We did ask about the biggest issues for using a cloud or hybrid solution for SharePoint. Security rated the highest, with 62% considering it a major concern, followed by concerns about information governance (51%), managing hybrid allocations (46%), integration with on-prem systems (45%), migrating content (43%) and geographical location of servers (43%). These numbers are very much in line with the general cloud concerns that we see in our other surveys.

Take Up of 365 Applications

Microsoft's cloud offerings can be confusing, and product names seem to change regularly. The most popular cloud product is Lync messaging, in use by 41%, followed by Exchange 365/Outlook Web, where take up has increased since our 2013 survey from 20% to 26%. Against this background, adoption of SharePoint 365/Online (cloud SharePoint) has jumped from 8% to 18%, alongside a jump in Office 365 from 7% to 13%. There is quite a variation by company size here, with 28% of the smallest, 10% of mid-sized and 16% of the largest adopting the cloud version of SharePoint, whereas for Office 365, small is at 17% with both mid-sized and large at 11%. This is likely to be a combination of late adoption by smaller organizations, and the bundling deals for smaller businesses around Office 365.

Even more intriguing is the take up of SkyDrive Pro, now OneDrive for Business, from 6% to 18% indicating that the demand created by the file-share and sync start-ups has been rapidly picked up by the incumbent supplier. Here, as we would more expect, smaller organizations lead the way with 26% using OneDrive for Business, with mid-sized and large at 10%.

Figure 15: Which of the following Microsoft cloud applications has your organization broadly adopted? (N=280)



When we asked in a little more detail about the use of Yammer across the organization, the picture is somewhat variable. Many of those reporting broad adoption in Figure 15 (18%) imply that it is very patchy between departments, or is mostly used by HR or IR. A further 22% have it, but the use is ad hoc at best. 21% report that they have adopted other business social or collaboration products.

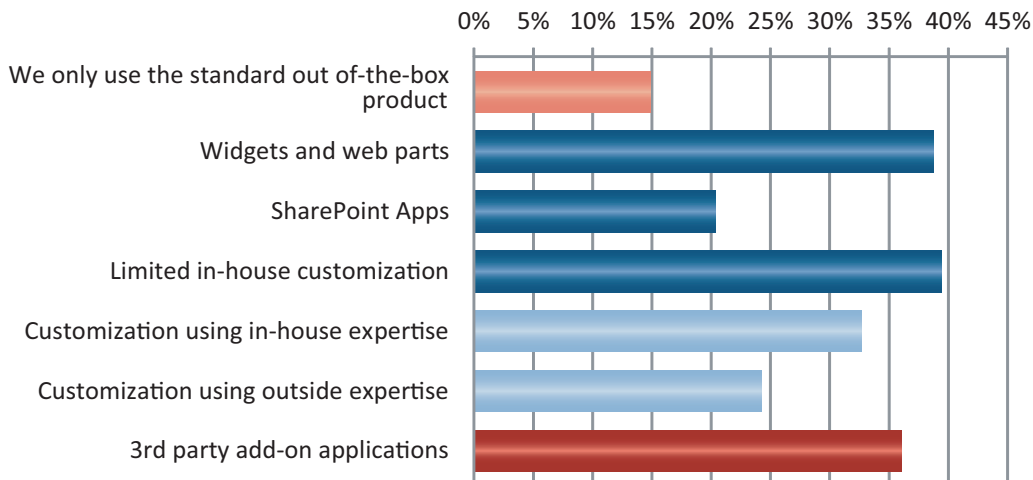
Broad adoption of Microsoft 365 products, including Office 365, SharePoint 365 and OneDrive for Business, have largely doubled since 2013 to around 15% of organizations.

Optimizations and Add-Ons

The platform nature of SharePoint and the tools provided by Microsoft have encouraged users to customize the platform, such that only 15% use standard out-of-the-box product. 39% have limited themselves to small amounts of customization, but a third have a significant amount of customization. In addition, 36% are using third party add-on product to fill out the functionality. This level of customization and add-ons has created one of the difficulties of moving to a SaaS approach, hence the introduction of SharePoint Apps in 2013.

The use of these optimizations is remarkably consistent across different business sizes. Mid-sized organizations are a little more likely to use outside customization, and less likely to use Apps.

**Figure 16: Which of the following optimizations are you using with SharePoint?
(Check all that apply) (N=269)**



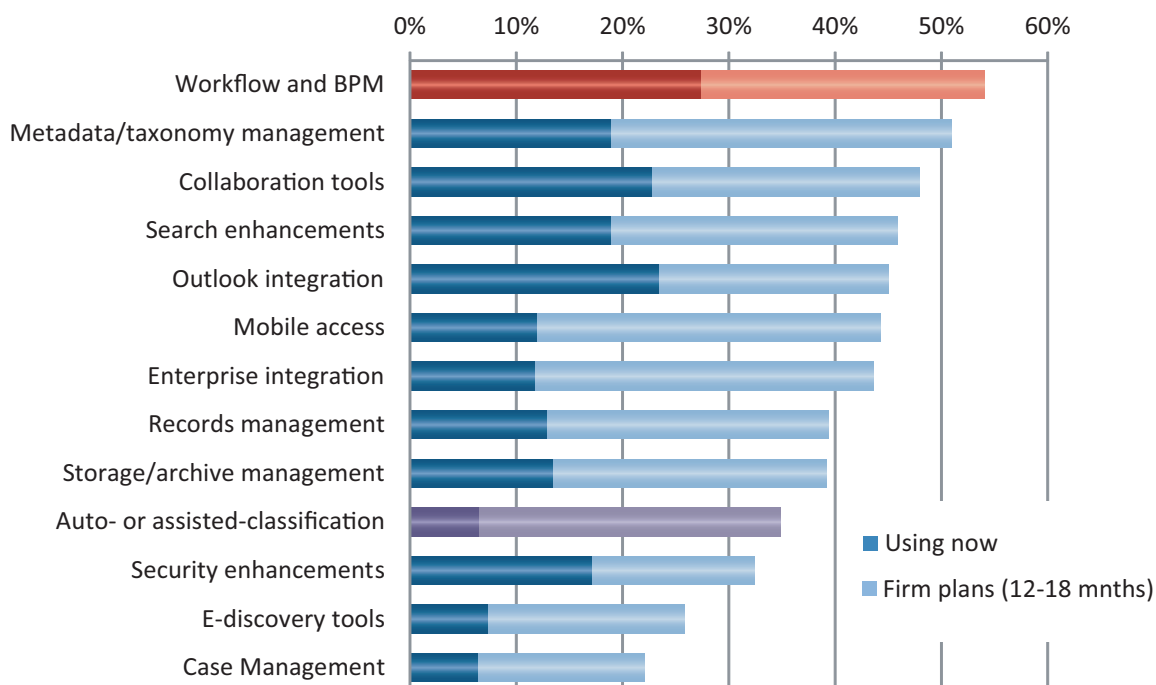
Third Party Enhancements

To make the list of add-on products easier to handle, we have broken them down into those that enhance the existing functionalities of SharePoint, and those that add new functionality that SharePoint does not attempt to do.

As we can see from Figure 17, workflow and BPM are the most popular extensions, generally offering both simplification and extension of the native functionality, with 27% using now and a further 27% with plans. Metadata and Taxonomy management, collaboration tools, and search enhancements all have around 20% adoption now, with 25-30% planning. Outlook integration products are already quite popular (23%) and are set to double.

Records management add-ons are popular, for the reasons we will see in the next section, and one of the most interesting data points here is auto or assisted classification. Only 7% have that now, but 28% say they have firm plans – a major increase, but not out of step with other AIIM surveys on this topic. The combination of content volume, software capabilities, and the recent NARA reports¹ (US) all point to the need to reduce the reliance on human classification and tagging, and rely on contextual, machine-applied business rules.

Figure 17: Which of the following third party enhancement products for SharePoint have you implemented/plan to implement? (N=256)

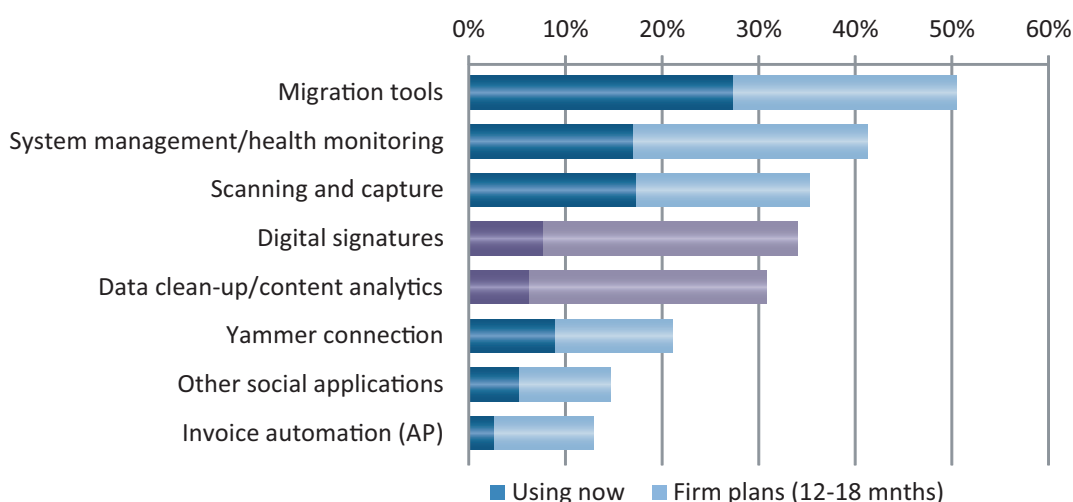


Auxiliary Products

Looking to the auxiliary products that build out the full ECM functionality set, we see that migration tools are important as users attempt to consolidate disparate repositories into a single SharePoint structure, or even consolidate different instances or versions of SharePoint together. In a similar way, data clean-up and automated tagging and classification tools can provide remedial work to correct for past deployments that were badly planned or poorly policed, and a huge increase is predicted here from 6% to 31%. Another big grower is digital signatures, in use by 9% now, but set to grow to 34%.

System management and health monitoring is another way to understand what is going on across large installations, and also a reflection of the fact that for many users, SharePoint is a business-critical system. 18% already have monitoring in place, with 24% looking to add it. Scanning and capture additions have been quite popular in the past (17%) and are set to increase by the same amount. Invoice automation/accounts payable is not a natural application for SharePoint, but add-on products can help here, and are set to grow quite strongly.

Figure 18: Which of the following auxiliary products for SharePoint have you implemented/plan to implement? (N=249)



36% already use third-party applications to enhance and optimize SharePoint, and our respondents indicate that they have plans to add many more across all product areas within the next 12-18 months.

Enterprise Connections and Search

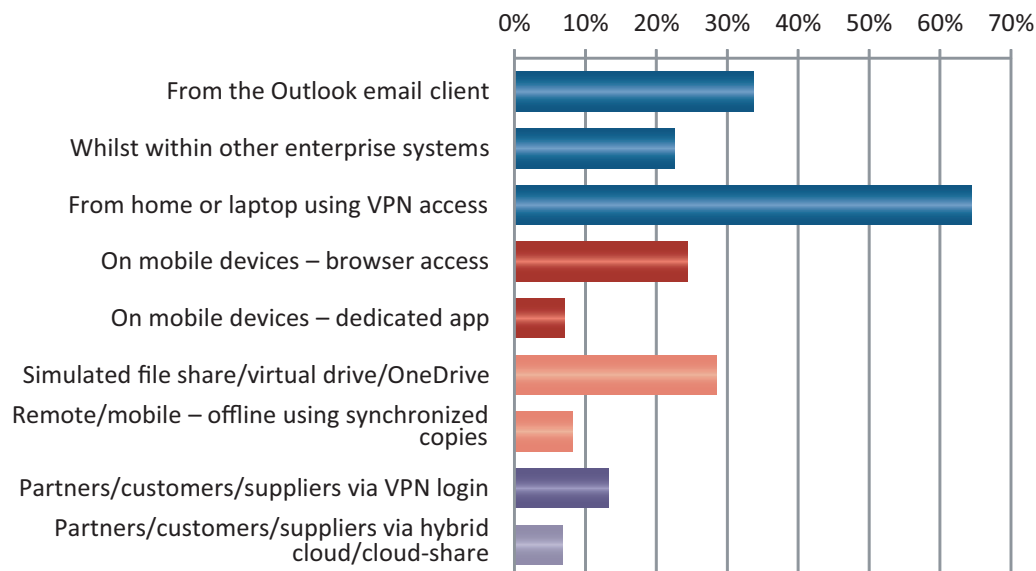
There are a number of aspects to enterprise connection. Firstly, how easy is it to access SharePoint from outside of the firewall and on mobile devices, secondly does that provide access to an enterprise portal and search capability, and thirdly, how widely is SharePoint connected to other enterprise systems and repositories?

Remote Content Access

Looking at all the ways that users achieve remote access (Figure 19) indicates that Microsoft has not made this straightforward. The Outlook client approach is popular with 34%, and many will be using an add-on product here to add extra capability. 23% are actually able to access SharePoint from within other systems, which is good.

Once we move outside the firewall, VPN connection is the most popular connection method (64%), despite being cumbersome to support, particularly on mobiles. The standard SharePoint browser screen has been somewhat unforgiving on mobiles but 24% use it. Microsoft have always resisted a true mobile app – which is, after all, a client – although there are other products available (7%). There are alternatives involving file synchronization and/or virtual drives, and OneDrive seems to provide a workable way to do this 29%.

Figure 19: In which of the following ways do users access content in your SharePoint system?
(N=270)

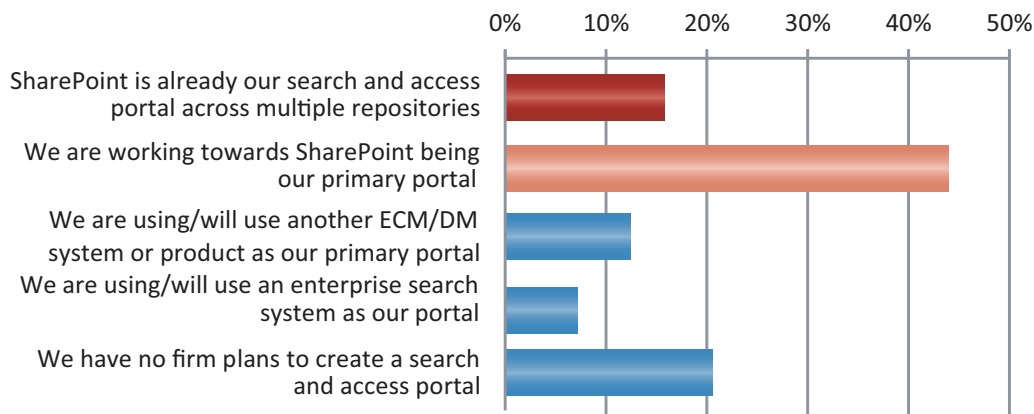


Access for external collaborators and partners has always been an issue with SharePoint, traditionally involving privileged VPN access (13%), but more recently available through hybrid cloud or cloud shares (7%). It seems likely at this stage that many of these are set up on a per-project basis.

Enterprise Search and Portal

From its intranet days, SharePoint was always intended to provide an access portal to content residing on other systems, and it supports APIs and CMIS in order to do this. Along with that goes search. Here the history was a little more chequered until the 2013 release, which consolidated (most of) the FAST features as standard. Leaving aside for now the actual degree of connectedness, 15% consider SharePoint to be their primary search and access portal across multiple repositories, but a sizable 44% have this as strategic objective.

Figure 20: What is your forward strategy for connecting SharePoint to other enterprise repositories? (N=269)



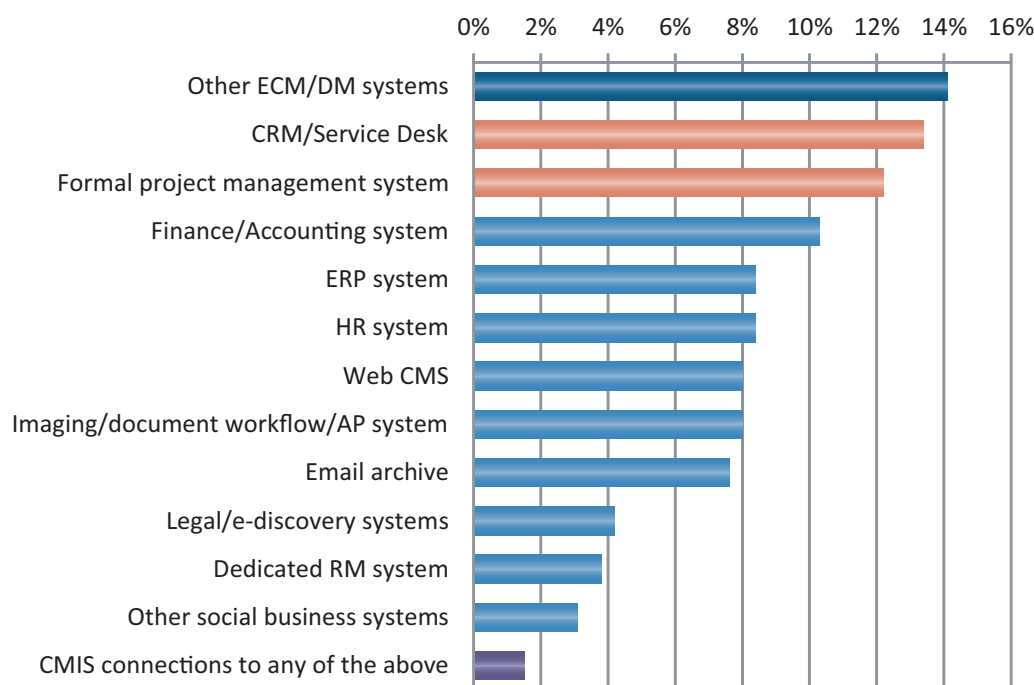
Enterprise Systems

There are generally three drivers at work when it comes to connecting SharePoint to other enterprise systems. Allowing staff to search and access SharePoint documents whilst working in those systems; allowing documents generated or collected in other systems to be accessed, managed or archived in SharePoint; and allowing transactional data from the enterprise systems to be accessed during a process workflow in SharePoint. All of these mechanisms go a long way towards breaking down isolated content repositories, opening them up to users who otherwise have no login access to the host systems.

As we might expect from our earlier statistics on multiple ECM/DM systems used alongside SharePoint, these are the most popular connections, but despite the fact that this could apply to more than half our responding organizations, only 14% actually do so. Next most popular is CRM and Service Desk systems – important for providing a widely accessible repository of customer communications. Given the popularity of SharePoint for project collaboration and team sites, connection to formal project management systems would also seem likely to offer many benefits.

47% of our survey respondents indicate they have no connections between SharePoint and other systems. Somewhat surprising is the low take up of CMIS connections, which may suggest that API connections are being used, possibly with limited functionality and high support overheads, or perhaps more likely, that productized connections are increasingly available between the major systems and SharePoint (which may or may not be based on CMIS).

Figure 21: Which of these enterprise systems have you connected to SharePoint?
 (N=139, excl. 123 “None of these”)

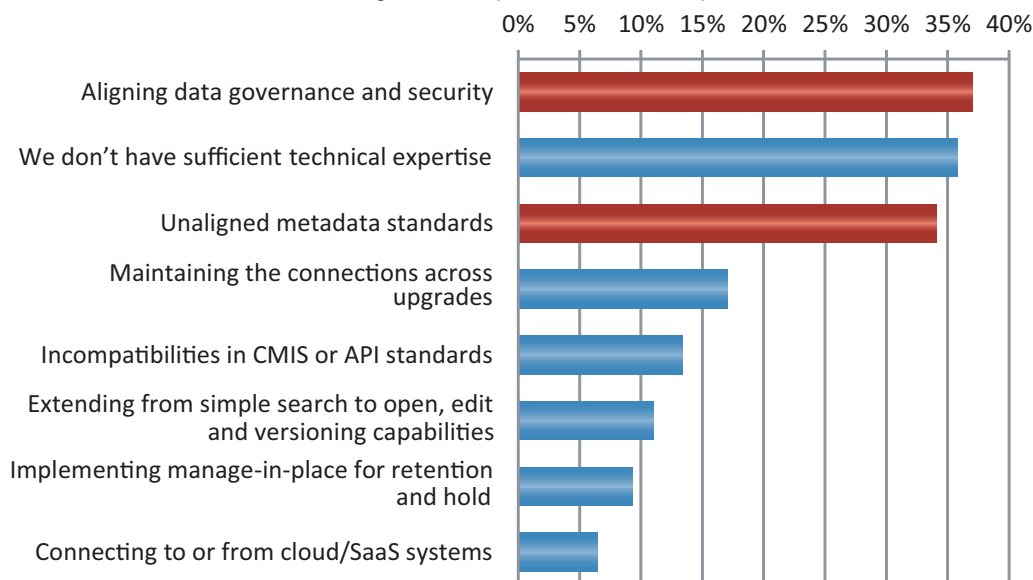


Connection Issues

Connecting content repositories will always give rise to alignment issues on security, governance and metadata, but if one of the systems has been poorly planned in the first place, these problems will become significant. No surprise, therefore that these issues figure strongly when it comes to connecting SharePoint. In particular, aligning security and access rights is an important requirement, even for simple search connections. There would seem to be a lack of technical expertise to both implement the connections, and maintain them across upgrades.

Overlaid on these technical issues is a general reluctance on the part of management to invest effort in these projects, summarized by the comment, “IT and the business users haven’t gotten together to really understand SharePoint and how it should be used in our organization.”

Figure 22: What have been your biggest issues with connecting SharePoint to other enterprise systems? (N=167, excl. N/A)



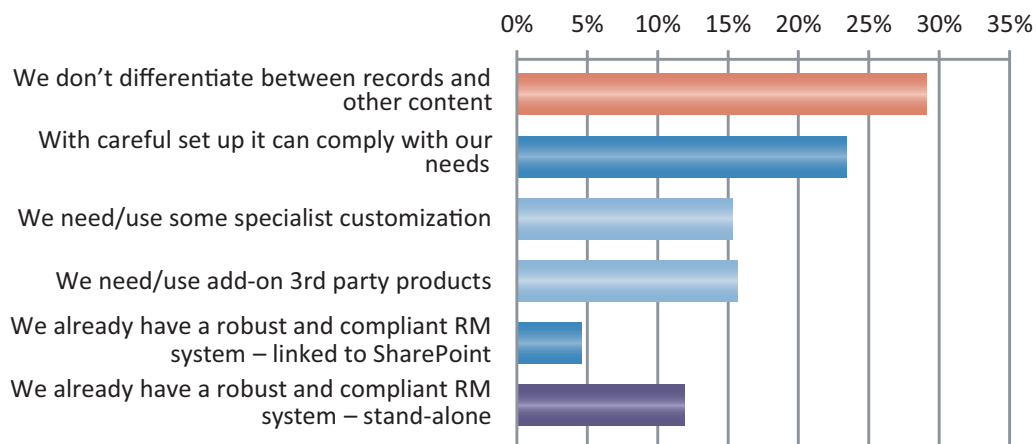
Although 60% of organizations see SharePoint becoming their search and access portal, only 53% have any connections to other systems, and for those that have, the biggest issues have been alignment of metadata and security, along with a lack of technical expertise.

Records Management and Information Governance

There has been much debate over the years about the ability of SharePoint to manage records in a compliant manner, particularly for users in regulated industries, and Microsoft have made incremental improvements with each release. 29% of our users do not differentiate between records and other content – and this applies to 26% of the largest organizations - we should perhaps hope that they have other systems that do store records. Beyond this, 23% feel that with careful setup, SharePoint does meet their needs – and this will depend on which version they are using.

There are readily available ways to boost the native RM capabilities, and 15% are using specialist customization and 16% are using dedicated third-party add-ons. 17% overall (and 22% of the largest organizations) already have a robust and compliant RM system, although most are not connected to SharePoint, creating a likely disjoint in many processes.

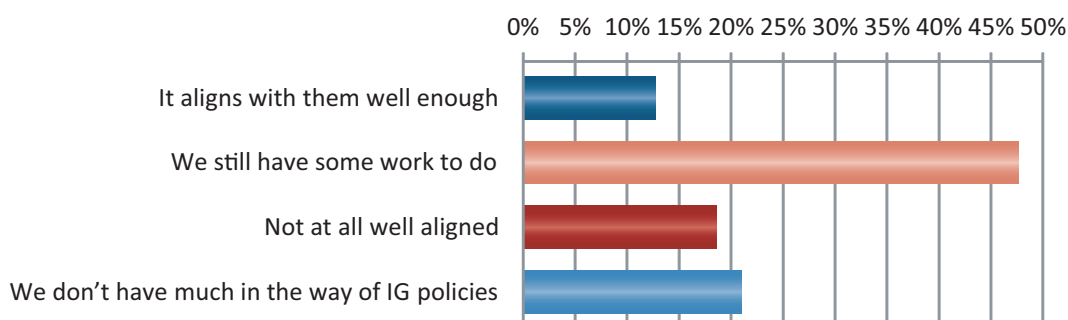
Figure 23: How does SharePoint match your records management needs? (N=252)



Introduced in 2010, Manage-in-Place is proving to be a popular mechanism for records declaration/capture (14%) compared to Records Centers (11%), though 21% do both. 15% move records out to a dedicated RM system.

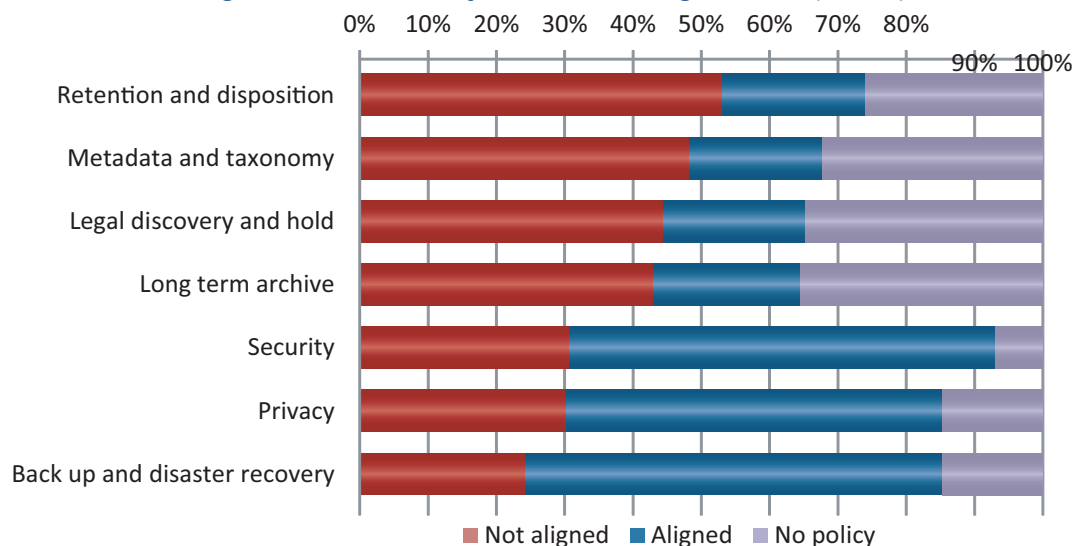
Even with these options for improving the situation only 13% feel that SharePoint is in good alignment with their information governance (IG) policies, with 48% still having work to do, and 19% acknowledging that they are not at all well aligned. Given the earlier comments about IT ownership, and lack of involvement with information management professionals, this seems somewhat inevitable.

Figure 24: How well aligned is your SharePoint with your Information Governance policies? (N=252)



When questioned further about the areas of biggest misalignment, retention and disposition are the most troublesome areas, with more than half being out of step. As SharePoint farms fill up with data, this lack of mechanisms to remove out-of-date content will create issues for the future. For retention mechanisms to work, the metadata has to be in good shape, and this is the next area of misalignment – hence the popularity of content cleanup tools that we saw earlier. eDiscovery and in particular legal hold problems will also follow on from this, although Microsoft has made some changes in recent versions. Accurate metadata and context search are particularly important when applied to legal discovery of emails, if they are stored as records in SharePoint.

Figure 25: Where are your main misalignments? (N=252)



The fact that security, privacy and disaster recovery are more likely to be aligned does not really compensate for the fact that a third of organizations have IG alignment issues in these vital areas, and 10% do not even have policies.

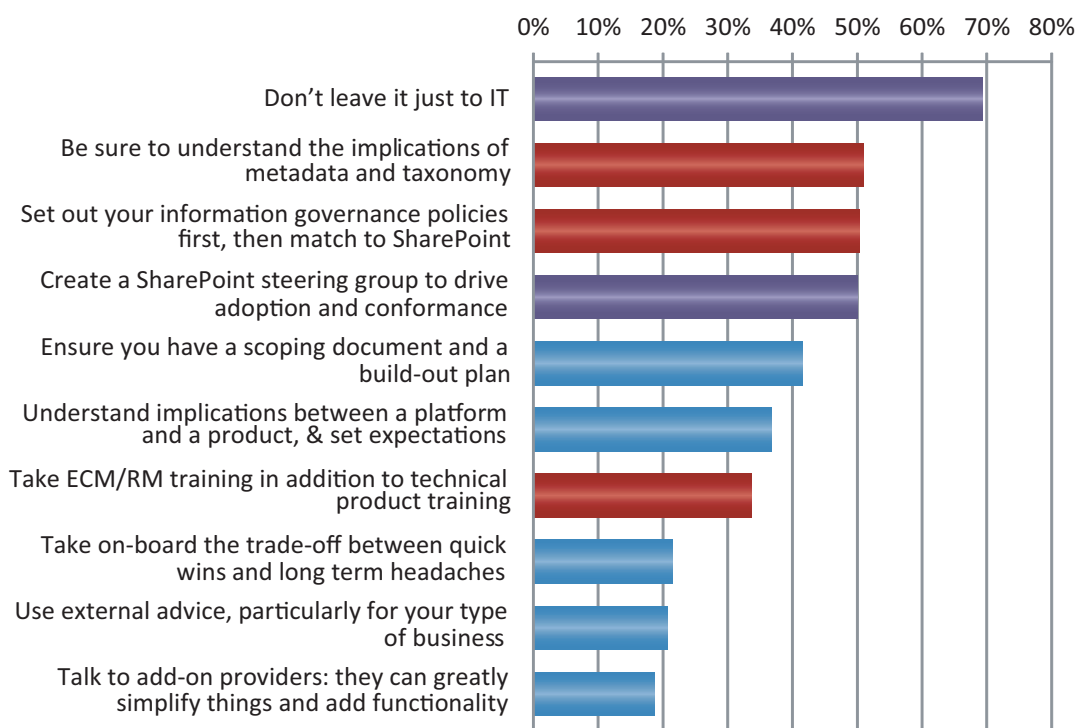
Microsoft has beefed up the SharePoint records management capability over the past three versions, but 47% feel they still need specialist customization, add-on product, or dedicated RM systems. For most, there is still widespread misalignment between IG policies and SharePoint.

Lessons Learned and Forward Strategy

There is now over 14 years of SharePoint experience built up in the user base, and the various implementation issues have been well set out by AIIM reports and others. Time and again we have heard that SharePoint has been an IT project not a business project, and as a result the implications of taxonomy and metadata have not been taken onboard, and information governance policies have been written as an afterthought, rather than as a blueprint for implementation. Another common theme is that SharePoint is a very flexible platform, with many functionalities, and users should not expect it to excel at any of them out-of-the-box.

Related to all of these is the fact that users should seek external advice, particularly for their industry, and training in ECM/RM as well as technical training – perhaps best summed up by the comment, “Records and content managers need to become more technical and IT needs to learn a little bit about content management”.

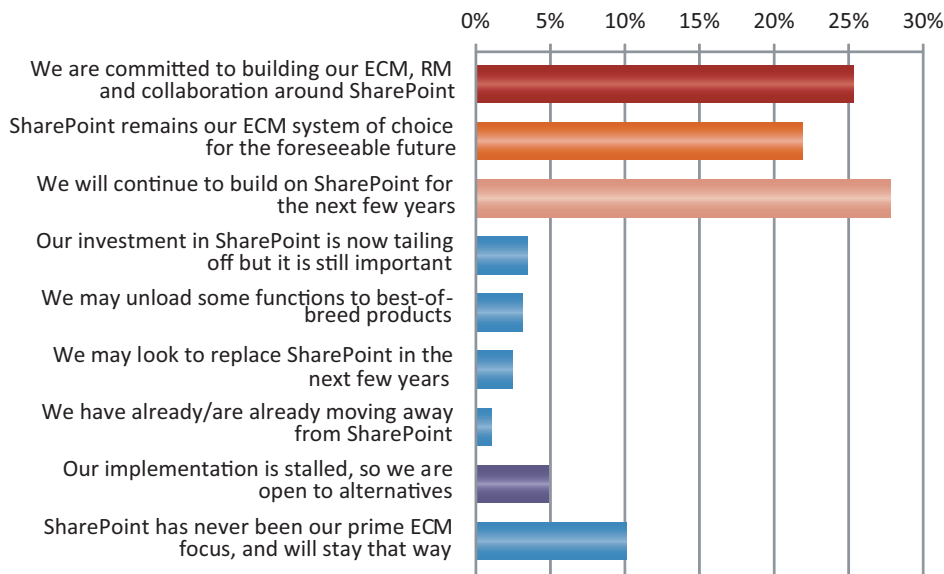
Figure 26: What are the key lessons have you learnt from your SharePoint implementation? (Check those that strongly apply) (N=294)



Strategy Going Forward

As we mentioned in the introduction, despite the fact that many observers may feel that SharePoint has lost its lead in collaboration and content sharing, particularly on cloud and mobile, and the fact that so many implementations are stalled or require re-work, there is still a strong commitment to making it work from 75% of our respondents. Even amongst the rest there is no real appetite to move away, with just 3% making a move, plus 5% who are open to options.

Figure 27: Which of the following best describes your likely strategy for SharePoint? (N=311)



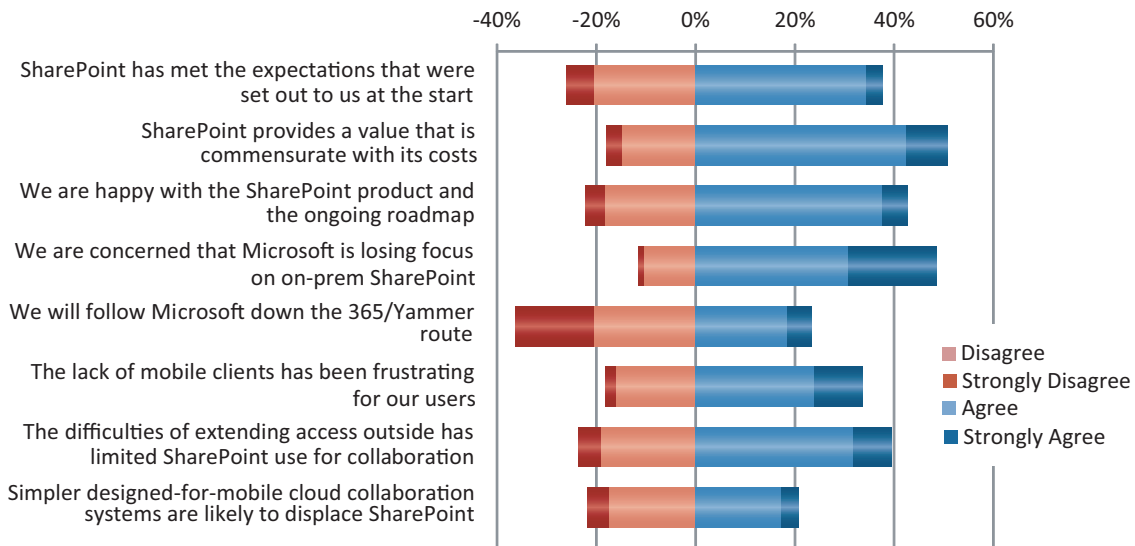
Opinions

There is no doubt that the functionality of SharePoint in the current versions far exceeds that of the original 2003 or 2007 versions, but that is when many of our users set out on their deployments, hence the fact that 26% feel it has not met their original expectations, and that so many have stalled or limited implementations. On the other hand, most feel that the value provided is commensurate with the costs, with only 18% in disagreement, and this by implication includes the extra costs incurred by customization and third-party products, which then justifies comparison with a more homogeneous ECM suite.

When it comes to the Microsoft roadmap for the future, 43% are happy, but 49% are concerned about loss of focus on the on-prem version. (At the time of going to press, Microsoft have announced that there will be another release of the on-prem version in 2015, which will provide better alignment with the cloud, particularly for hybrid schemes). Even so, 37% say they are not likely to follow Microsoft down the 365/Yammer route.

There is general agreement that the lack of mobile support and the difficulties of external access have been frustrating (35%), and 20% feel that SharePoint is under threat from designed-for-mobile cloud collaboration products and services.

Figure 28: How do you feel about the following statements? (N=305, excl. neutrals ~40%)

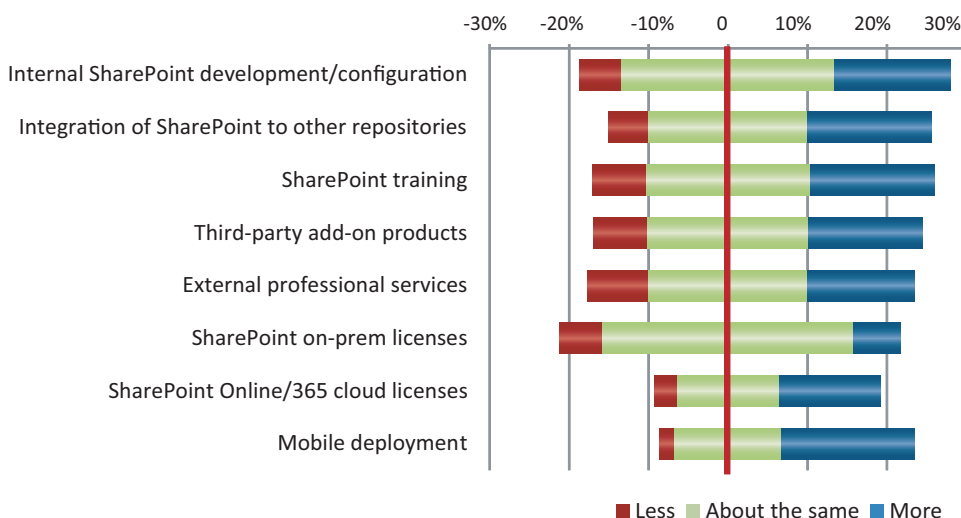


The majority of users are happy to accept the SharePoint product roadmap, but there is concern about long-term support for on-premise versions, and frustration with mobile provision.

Spend

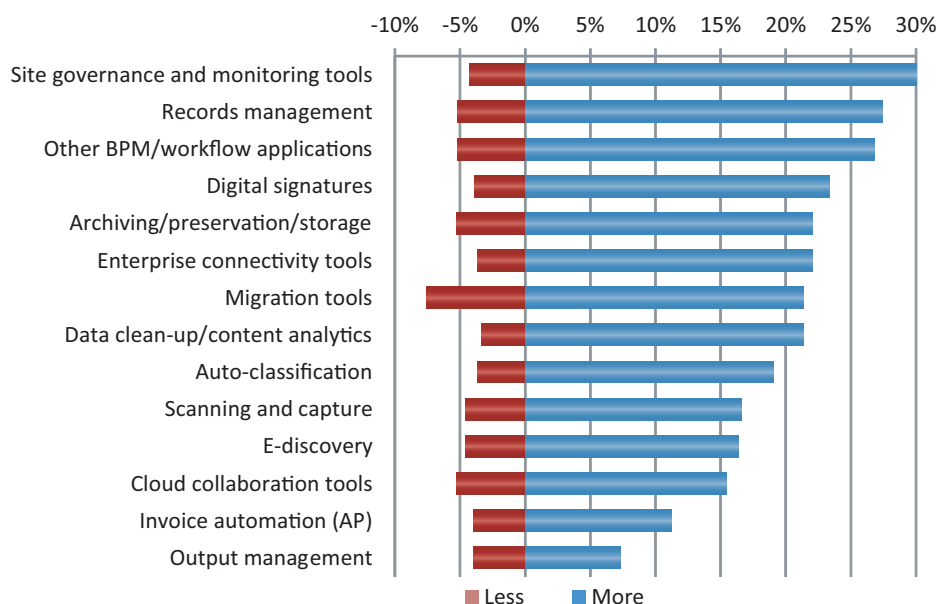
The indications are for growth in most areas except on on-prem licenses. 31% expect to spend more on external training, and 27% on external services, which indicates an intention to correct the issues we highlighted earlier, although these are offset by those spending less, giving a net of 18% and 12% respectively. A net of 15% of organizations plan to increase spend on third party products. There are strong intentions to spend much more on Online/365 licenses and on mobile deployment.

Figure 29: 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=322, line length indicates, "We don't spend anything on this")



When it comes to specific add-ons, spend on site governance and system-monitoring tools looks set for the biggest increase in the next 12 months, followed by records management, BPM and digital signatures. Connectivity, clean up and auto-classification are all set for good growth.

Figure 30: 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=314, excl. "Same")



Spend on cloud licenses and mobile are set for a considerable increase, and the outlook is positive for a whole range of third-party products, particularly monitoring, RM, BPM and digital signatures.

Conclusion and Recommendations

It is inevitable that the shine will have worn off any product that is in its fourteenth year, particularly one that earned its early adoption by being virtually given away and deployed on a “let’s see what this can do” basis. With no scoping exercises, business plans or local content management expertise, it is inevitable that expectations have not been met. With no upfront endorsement from senior management, it is equally likely that roll-outs will stall and user adoption tail off. All of which is unfortunate, as SharePoint is a very versatile platform, and along with the feature improvements over the years, and in particular the ecosystem of add-on products, it has actually been the first product to provide a genuine and affordable enterprise-wide ECM capability.

It is also unfortunate that a product that pioneered browser-based website collaboration has found itself blindsided by many new and more agile collaboration and content-sharing tool-builders, designing specifically for cloud and mobile. They have been using similar tactics to Microsoft’s original giveaways and back door entry into the enterprise, although frequently aiming to by-pass IT, going direct to business users rather than coming in through IT.

So are users deserting SharePoint in favor of the shiny new products? Well the answer from this survey is no. More than three-quarters of those we surveyed are committed to building and extending SharePoint as a strategic focus for quite a while yet, with less than one in ten showing any signs of moving on. They are looking to kick-start their stalled implementations, re-training users, seeking out senior management support, and using information governance policies for guidance.

They are also looking to build out with more customizations and third party products, but they are also mindful of future moves to a cloud or hybrid model, which many are already factoring in as they seek to evaluate - and likely follow - the Microsoft roadmap.

Recommendations

- If your SharePoint deployment is stalled, or failing to add new value, consider what the reasons are, and how these issues can be corrected.
- Seek endorsement and confirmation from above that SharePoint is your go-forward strategy for ECM and RM. Apply for budget for both training and system enhancement.
- It is never too late for a new round of training for your users, but you may benefit from more generic training in content and records management yourself, in order to correct previous mistakes with content classification, metadata and taxonomies.
- If you do not already have one, develop an information governance (IG) framework, and use this to see where you have gaps in your SharePoint capability, particularly with regards to records management.
- It is likely that early implementations lacked metadata controls and are inconsistent with your current IG policies. Consider using content clean up and migration tools to fix existing data using content analytics. To maintain clean metadata and consistent taxonomies going forward, look to automated classification and tagging tools.
- You may also need to add RM-specific products, or linkage to a dedicated RM system to meet your compliance needs.
- Emails are an important aspect of IG, and there may be better ways to integrate important emails into SharePoint, incorporating auto-classification to simplify user requirements.
- A key area for added value is to move business processes away from paper and into SharePoint. Avoid lock-in to custom workflow development by utilizing a dedicated add-on product.

- Evaluate how easily your users and your external partners can access SharePoint remotely or from mobile devices. This may be an important driver for a move to the cloud, most likely in a hybrid model that retains some reassuring on-prem security.
- SharePoint can be a good consolidation product for search and access across multiple repositories, including cloud and hybrid ones. Look to link it to your other enterprise systems, simplifying business processes that involve both transactional and unstructured content.
- As SharePoint becomes more and more business-critical, be sure to update your system and process monitoring tools to improve visibility and pre-empt problems.
- Yammer is not the only option for social business, and you may find better tools that (ironically) are more closely integrated with SharePoint, particularly on a project-by-project basis.

References

1. “Automated Electronic Records Management Report” National Archives and Records Administration 2014. www.archives.gov/records-mgmt/prmd/A31report-9-19-14.pdf



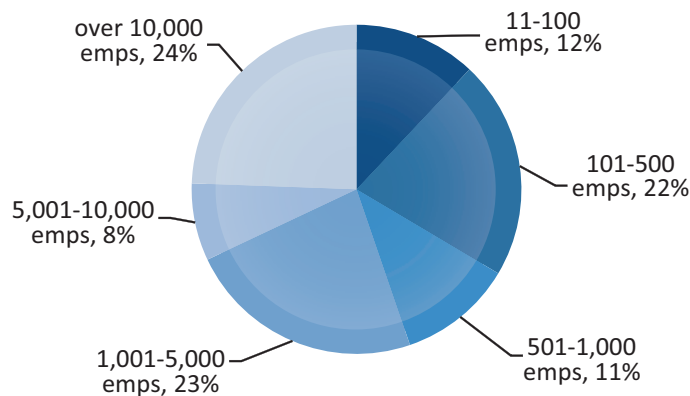
Appendix 1: Survey Demographics

Survey Background

The survey was taken by 422 individual members of the AIIM community between Dec 19 2014, and Jan 14, 2015 using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 80,000 AIIM community members.

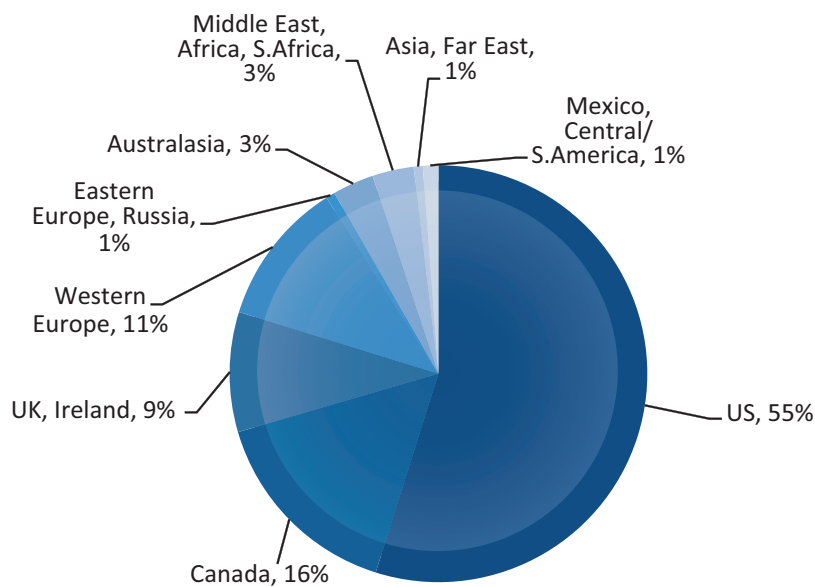
Organizational Size

Survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 32%, with mid-sized organizations of 500 to 5,000 employees at 34%. Small-to-mid sized organizations with 10 to 500 employees constitute 34%. Respondents from organizations with less than 10 employees have been eliminated from the results, taking the total to 366 respondents.



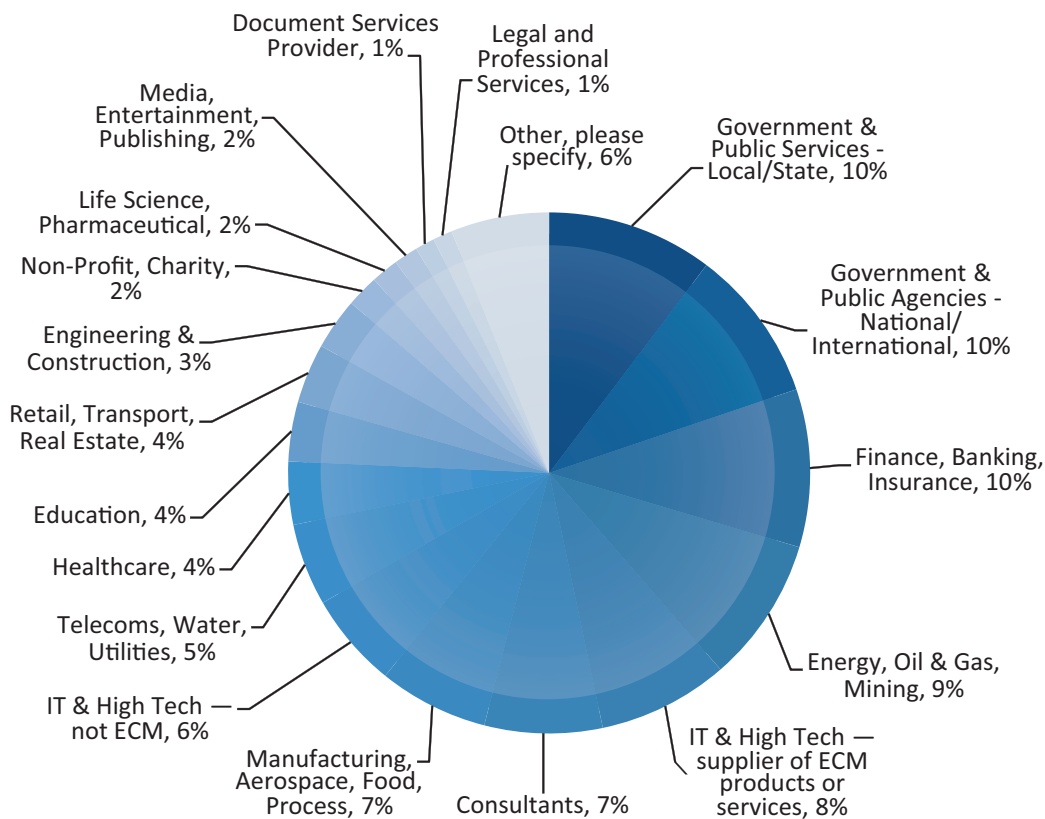
Geography

71% of the participants are based in North America, with 21% from Europe and 8% rest-of-world.



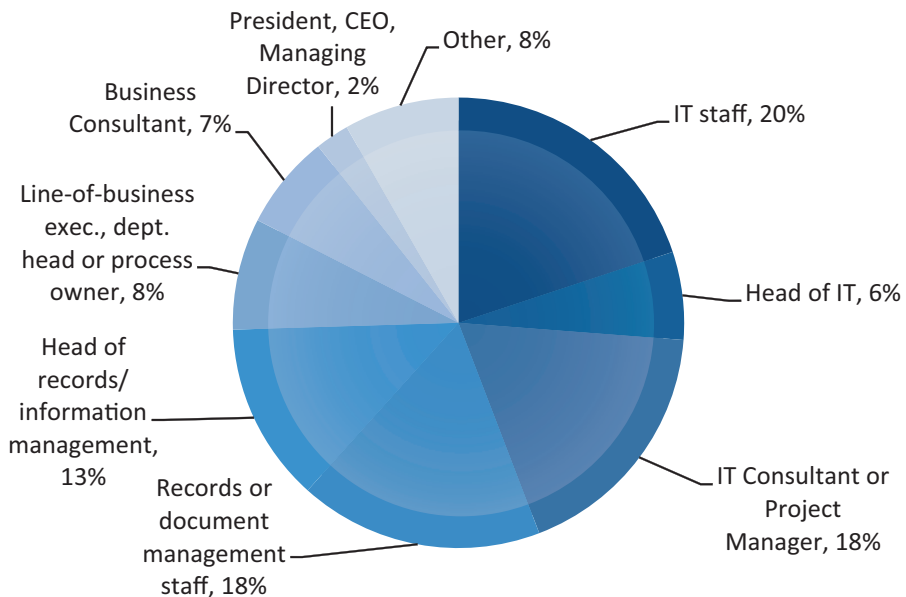
Industry Sector

Local and National Government together make up 20%, and Finance and Insurance 19%. 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

44% of respondents are from IT, 31% have a records management or information management role, and 25% are line-of-business managers or consultants.



Appendix 2: General Comments

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

- SharePoint has been a good move for us and we are finding more value with each project.
- SharePoint tries to do too much and makes it difficult for administrators to manage.
- Most issues with SharePoint relate to rudimentary OOB deficiencies that hinder governance since we have to bridge into custom development options which are not justifiable.
- Using bespoke development to get SP2007 to do records management and legal hold was probably not money well spent.
- SharePoint is and will continue to be a value tool and software to our organization. The key is it is “just a tool/software” and as with any “tool/software”, if it’s not used properly, deployed incorrectly, etc., then it will fail to meet expectations which is what we’re experiencing.
- Lack of BPM functionalities is still the major issue. I suggest adopting a 3rd party solution.
- SharePoint is a “box of Lego” - site owners can do so much that it’s getting to be too much for them.
- Disappointed with Microsoft’s changing strategies for apps, cloud vs. on-premise.
- SharePoint requires much more FTE’s than management is aware of. Our feeling is that for a fully used SP farm you need about 4 FTE per 1000 users for support, training, and customizations.
- SharePoint worked brilliantly inside the Information Systems function but when social platforms matured they totally destroyed SharePoint’s standing, which did not keep pace!
- Our organization decided to move to SharePoint Online/Office 365 with very little serious consideration of business requirements or alternatives.
- IT has controlled SharePoint and made a mess of things.
- We will be taking a more serious look at using SP in our organization after we migrate to 2013. We need to re-think how we want to do business and build the SP environment accordingly.
- When rolling out SharePoint make sure someone in the IT group has some idea of what they are doing. We have a very inept group who know very little about SharePoint and that has caused so many of the challenges we are now facing years later.
- Trying to do it “right” (info arch, info gov, metadata, taxonomy, cleanup files before migration, adoption planning, etc.) is way harder and more time-consuming than expected.



About Colligo

Colligo is the #1 provider of data synchronization solutions for SharePoint/Office 365. The company's flagship software, Colligo Engage, enables workers to have easy, anytime access to content stored on enterprise information systems such as SharePoint/Office 365, regardless of device or connectivity. Colligo's award-winning technology is used by over 5,000 organizations worldwide (including Microsoft, Exxon, Siemens, Towers Watson, Shell, Bayer and the US Department of Energy) to improve mobility, streamline collaboration and reduce IT risk. Colligo is a Microsoft Gold Application Development Partner and has a decade-long relationship of providing subject matter expertise to Microsoft leadership.

The platform:

Colligo Engage apps provide deep integration of SharePoint/Office 365 features to ensure a productive user experience within everyday business tools - Outlook, Windows Explorer, Mac Finder, tablets and mobile phones. The Colligo Engage Console gives administrators central control for configuring Colligo apps and for managing engagement and compliance.

Colligo for SharePoint/Office 365 mobility

Anytime. Anywhere. Any device:

Ensure productive offline and mobile access with features such as check-in/check-out, metadata extraction and editing, PDF annotation, previewing and content sharing.

- Provide anywhere access to Office 365/SharePoint
- Efficiently distribute content to field workers
- Embrace BYOD
- Monitor compliance and engagement

"Colligo is fast, easy to work with, and content is available offline. Importantly, it is allowing our technicians to work more safely." - Northpower

Colligo for SharePoint/Office 365 email management

Easily manage emails, attachments & metadata

Colligo Engage helps you solve your SharePoint/Office 365 email integration challenge with enterprise-class email and records management solutions for desktop and mobile devices.

- Seamlessly sync emails and attachments to SharePoint
- Automatically resolve syncing conflicts
- Replace email attachments with links to reduce duplication
- Drag-and-drop emails and attachments from Exchange to SharePoint
- Tag and categorize emails with metadata

"One of the great benefits of Colligo is that you can access your entire SharePoint repository from inside of Outlook." - Microsoft

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- **How to Use Content Types for Effective Records Management**



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- **How to Get Users to Manage and Share their Content in SharePoint 2013 and not Elsewhere**
- **How to Create Information Management Policies in SharePoint 2013**
- **How to Create and Manage Metadata in SharePoint2013**
- **How to Create and Configure SharePoint2013 Records Center**
- **How to Create a File Plan in SharePoint2013**
- **How to Provide Faceted Navigation in SharePoint 2013 Search**
- **How to Capture Records into SharePoint2013**

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