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## Content Collaboration and Processing in a Cloud and Mobile World

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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 464 individual members of the AIIM community between Jan 24, and Feb 11, 2014. 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 2. Graphs throughout the report exclude responses from organizations with less than 10 employees, taking the number of respondents to 421.

## About AIIM

AIIM has been an advocate and supporter of information professionals for 70 years. The association mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and Big Data. AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community: practitioners, technology suppliers, integrators and consultants.

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## Introduction

Collaboration is a universal door opener. What CEO or project director would turn down a request to improve and enhance the sharing of information, ideas and comments? Providing a place for project teams or like-minded individuals to “hang out” and pool their resources has to be a sure-fired business improvement. So when the first generation of on-premise team-site and document-sharing applications came along, replacing intranets and truly extending document collaboration across the business, users jumped on their newfound power to quickly create homes for their project teams. For a while project sites proliferated amongst departmental groups with very little control or governance. Document libraries quickly grew, with very little thought to classification and lifecycle management. Slowly control was re-established. Governance policies were drawn up, taxonomies and templates nailed-down, and compliance workflows enforced - albeit that this additional control somewhat reduced the ease and simplicity that these systems once provided.

However, these now well-established systems have struggled with two growing collaboration needs. The first is to quickly and easily link external users residing outside of the firewall into the content-sharing environment. The second is to give users access to collaborative content from their mobile devices and to enable remote participation in review workflows.

So a new generation of cloud-based content sharing tools came along, demonstrating how much simpler it could be to share files with any partner or outside team, either by storing them in a common-access area in the cloud, or by synchronizing content between two computers or devices via the cloud. Most of these “file share and sync” applications adopted a “mobile first” approach, thereby solving both of the collaboration needs mentioned above. Along the way, some added social elements such as comment streams and shared wikis. Given their “easy start” approach, these services have been readily adopted as a way for project teams to share and communicate - frequently operating under the radar of the IT department.

Many on-premise collaboration and ECM system suppliers have responded by establishing cloud-only versions of their product, or extending their on-premise system into a hybrid cloud model. Others allow these new cloud collaboration services to synchronize back to established on-premise ECM systems.

Because of these different models, there is considerable confusion and indecision within the user base as to the best way forward, along with significant concerns about security and control. For our survey, we set out to measure the drivers for collaboration, the strategy choices being made, and the feature sets required. We also look at the user requirements for mobile content access and mobile interaction with content processes and workflows.

## Key Findings

### Drivers and Concerns

- **Internal collaboration is “crucial” for 63% of businesses.** External collaboration is crucial for 32%. Plus 30% who consider both to be “Very important”.
- **The biggest drivers for collaboration are general productivity, knowledge pooling, and pulling together a dispersed workforce.** It is also important to speed up review processes, customer responses, and project completions.
- **50% consider their organization has shortfalls in technical support for internal collaboration, rising to 71% for external.** In particular, 39% feel quite strongly that external collaboration is badly supported.
- **The most important features to support collaboration are sharing of documents, workflows for comments and approvals, and project sites.** Content access from mobile devices is also a key enabler.
- **Consumer file-share and sync services are banned in 56% of organizations, although only 27% actually restrict access.** 20% know their policy is being circumvented, and 30% have no policy. 23% provide an approved business grade alternative.

- **The biggest driver for adopting a formal collaboration system is controlling the way documents are shared, with a view to improving compliance.** Extending access to mobiles and remotes is also high on the list, as is sharing big files and avoiding multiple attachments.
- **Ownership is the biggest concern regarding a formal collaboration system, along with managing which content can be accessed by whom.** There is also concern over duplicating repositories.

### Adoption Strategies

- **47% are looking for a hybrid collaboration support solution and 9% for a fully cloud option.** 25% are happy with an on-premise solution.
- **Of those considering full or hybrid cloud, only 9% would say they have completed a company-wide deployment. 33% are implementing or integrating across departments.** 24% have plans in the next 12 months.
- **The most likely reason for non-adoption is that no one is taking the initiative. 22% don't want their content shared around.** 16% are confused by the options and pace of change.
- **25% have or will converge to a single system across the enterprise.** 53% have different systems in use, often with overlapping capabilities.
- **49% have chosen to use the standard collaboration functions of their existing ECM/DM system or will upgrade to a cloud version of it (13%).** 17% are looking to a new cloud-based system linked to their existing ECM/DM, or a new cloud and on-prem hybrid. Only 10% are using, or plan to use, a stand-alone cloud system.

### Features for Selection

- **Security is even more important than functionality when it comes to selecting a collaboration system.** Next comes price, then compatibility with existing ECM/DM systems.
- **Beyond file sharing and project sites, security management is important, especially for managed access by external users.** Mobile access is the highest "want but don't have" feature. Yammer style message feeds are very low on the list.
- **Document versioning and check-out/check-in are important and mostly available, but tasking, workflow and approvals seems to be a struggle for some.** Retention/expiration is also much sought after, and synchronization to ECM is only available for a third currently.
- **When it comes to mobile features, everyone is looking for containerization and security, preferably synched from the ECM system.** Review and annotation is slightly more desired than editing functionality.

### Mobile Access to ECM Content and Process

- **49% allow mixed personal and company use for mobiles, but only 20% of these are true BYOD. 22% restrict or ban company content on mobile.** 20% have no official policy.
- **54% consider they have client access to their main ECM/DM system via VPN for remote/mobile employees and 3rd parties.** 34% have browser access, but only 16% have it optimized for mobile. Only 18% have a true mobile app.
- **Less than 25% have any document create, edit or workflow capability on mobile, although 85% would like to have it.** 48% have view-only access on mobile.
- **Reports, dashboards, and electronic forms are the most popular process functions to access from mobile, although only 30% have this ability now.** Electronic approvals and workflow sign-offs would be the next most popular, with only 20% having this now. There is strong interest in signatures of all types.

### Opinions and Spend

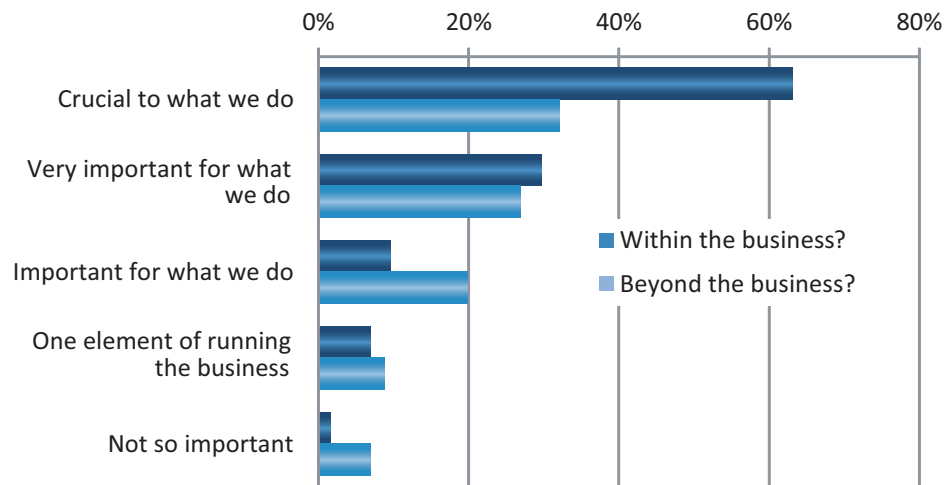
- **89% of the respondents agree with the statement that a formal collaboration system is a vital piece of infrastructure these days,** but 54% are finding the rapid convergence of collaboration and social tools to be very confusing.

- **There is also strong agreement (72%) that connecting these systems of engagement to systems of record is a huge challenge.** It is not universally agreed that cloud and mobile are an essential part of collaboration.
- **Spend on mobile content applications, process interaction through electronic forms, and mobile capture applications is set for considerable growth.** Collaboration extensions or modules for existing ECM, and hybrid cloud extensions, are more likely to see increasing spend than on-premise collaboration systems, but the only non-growth area is on-premise social business platforms.

## Drivers and Concerns

As we mentioned in the introduction, internal collaboration plays an important part in day-to-day activities in most organizations. For 63% of those we surveyed, internal collaboration is considered “crucial” with a further 30% indicating that it is “very important”. External collaboration, on the other hand, depends a little more on the type of business, and the extent to which there are working relationships with partners, external professionals, and so on. Even so, 33% still consider it to be crucial and 27% very important, taking the total to 60% across all types of business.

**Figure 1: Given the nature of work in your organization, how important is it to facilitate effective collaboration within the business/beyond the business? (N=420)**



We asked respondents about specific collaboration requirements in their organization or department. Contracts, bids and proposals are frequently mentioned, along with projects in general, and reviews and sign-offs. Sales and marketing coordination, R&D, and case management are also mentioned. It is worth noting, as an example, that facilitating an improved process for bid preparation and contract negotiation is almost certain to make a strong contribution to winning a bid, and also to ensuring there are no future surprises on its profitability. When it comes to joint bids involving prime contractors and sub-contractors, we can see how important it would be to extend collaboration outside of the firewall, but in a controlled and secure way.

### Strategic Drivers

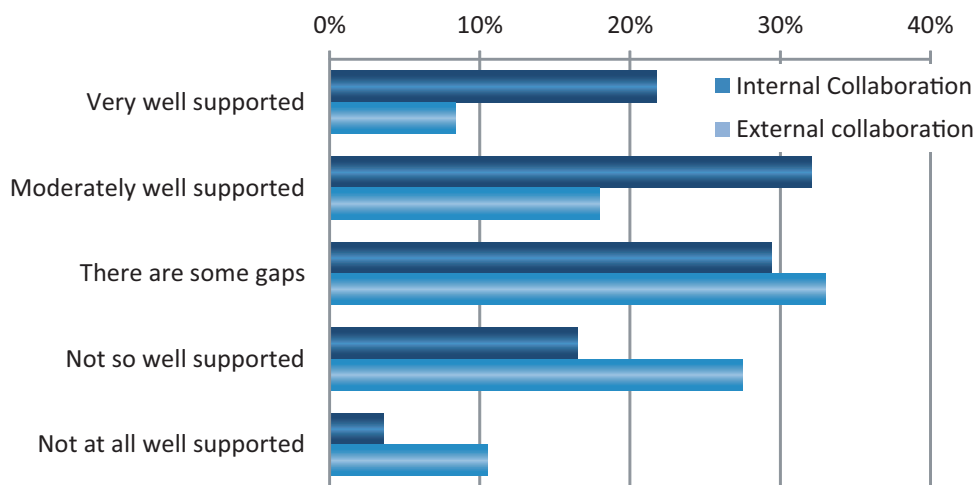
Looking to the drivers that make collaboration important, pooling the knowledge base that exists in the business is considered second only to a general improvement in productivity. This idea of raising the general level of wisdom is why we have always had meetings and discussions. In the modern workplace this may well involve a geographically distributed workforce, hence the third highest driver in Figure 2, as well as matrix project management, which crops up further down. Making the most of the electronic sharing process will speed up review processes and sign-offs, produce faster and better responses to customers, and result in faster project timelines and on-time completion. Here again we see a potentially crucial impact of collaboration on profitability, improving time-to-market, completing work ahead of time-penalties, and creating a reputation for timeliness.

**Figure 2: What would you say are the three biggest strategic drivers in your organization for improved collaboration in general? (N=417)**



Given the stated importance of effective collaboration to the business, we then asked our respondents if they are happy with the degree of technical support it receives. This is where the gap between internal and external collaboration support opens up. Half consider there are gaps in support for internal collaboration, although only 21% would consider it to be badly supported. For external collaboration, the shortfalls rise to 71% with nearly 40% considering support to be poor. This poor level of support remains true even in organizations where external collaboration is crucial.

**Figure 3: How well supported do you feel employees in your organization are when it comes to technical support for internal/external collaboration? (N=417)**

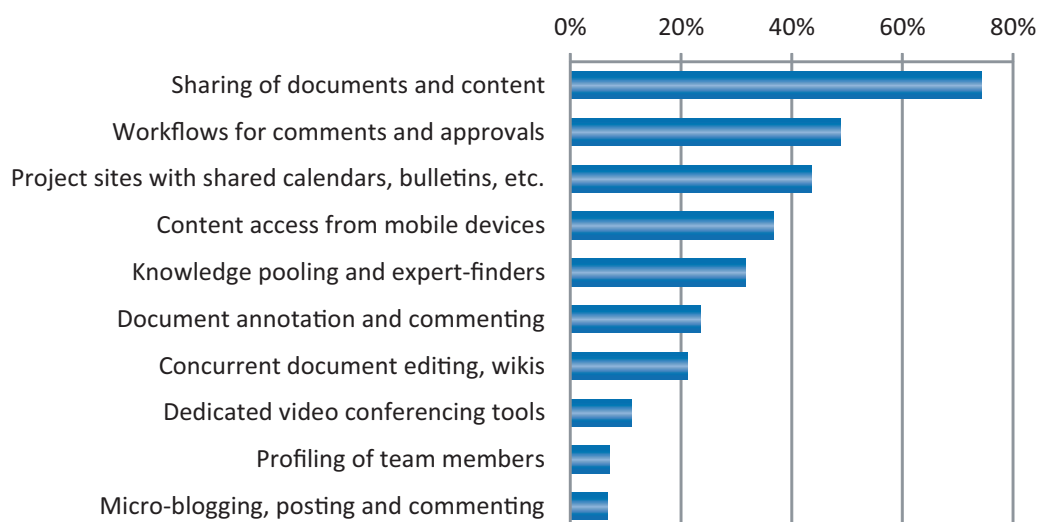


71% feel there are gaps in support for external collaboration in their business, with nearly 40% considering support to be poor.



When pressed to say which types of technical support are the most important, sharing of content and documents is understandably vital, but workflows for comments and approvals is also a strong need. After project sites, with the usual communal calendars and so on, comes content access from mobile devices. Interestingly, social tools such as blogs and comment streams are given a low priority.

**Figure 4: Which three of the following would you say are the most important for improving collaboration? (N=272)**



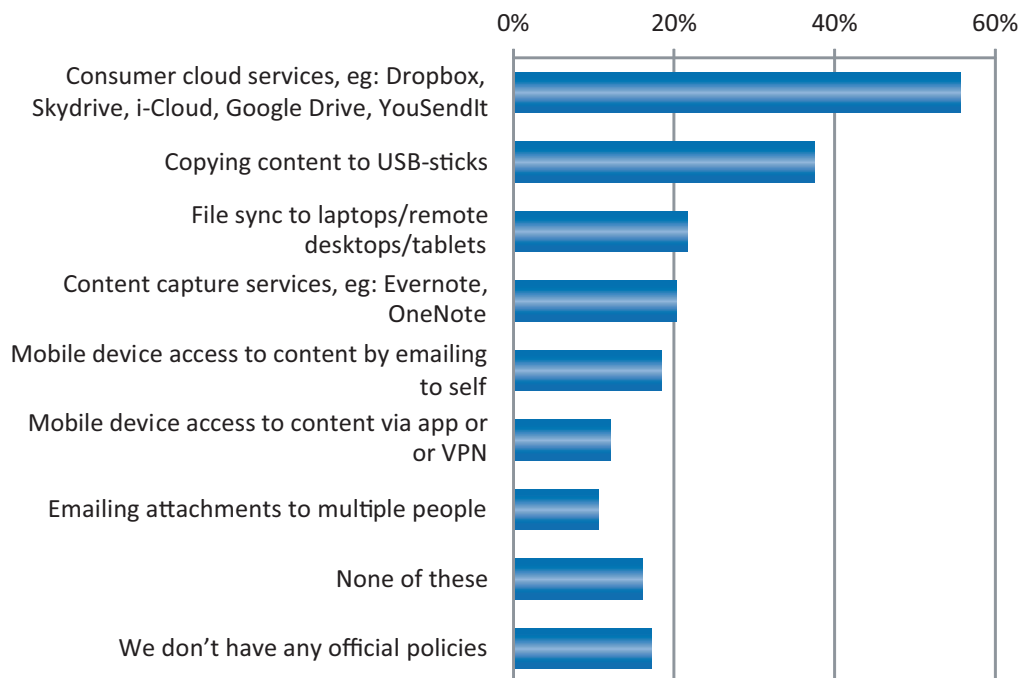
Sharing of documents and content is by far the biggest element in improving collaboration, and as we have seen, this is very likely to involve external collaborators outside of the firewall. As we discussed in the introduction, many project groups or business teams will feel that setting up a document sharing mechanism that is quick and simple will be more useful to them than working through more formal content control systems. Traditional on-premise systems will have been deliberately set up to be secured against access to those outside of the business. Inevitably, many users will turn to consumer cloud file-sharing services such as Dropbox, Skydrive, i-Cloud, Google Drive and YouSendIt.

### File Share and Sync Services

Quite rightly, most IT departments seek to protect their systems and content from being shared in this uncontrolled way. 56% have a policy that bans use of these services, along with a number of other copying mechanisms that can result in unsecured content leaking from the business. Of note is the fact that copying via USB sticks is banned by 37% whereas file sync between computers is only forbidden by 22%. Although given later as a reason for a formal system, only 11% actively discourage emailing attachments to multiple people – the default collaboration mechanism in most organizations.

A third of responding organizations either have no policies to protect data in motion, or their policies do not bar these mechanisms.

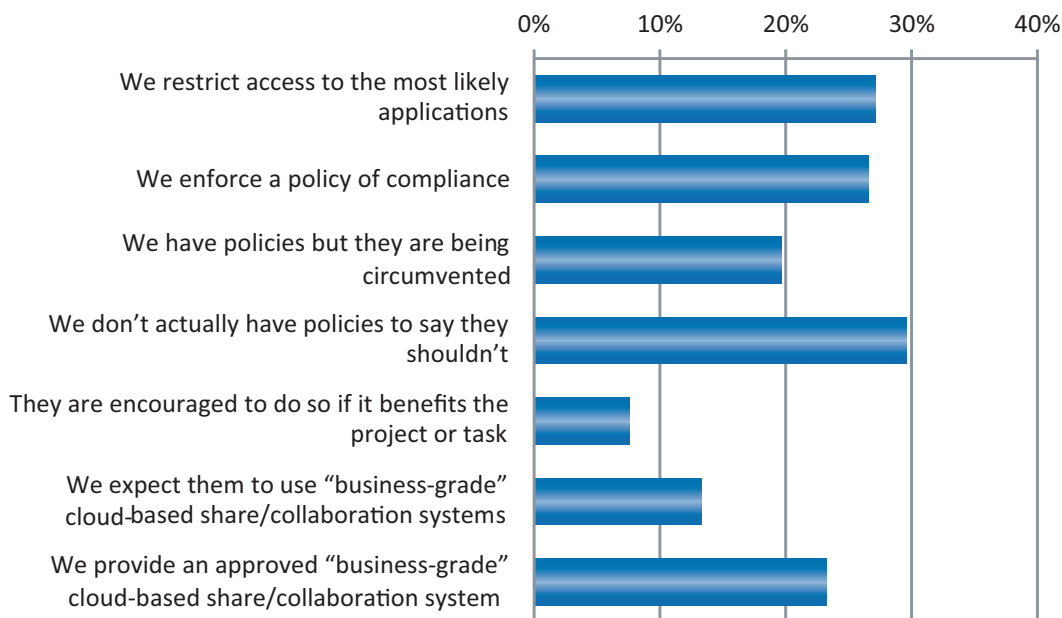
**Figure 5: Which of the following ways of accessing and sharing company content are against official policy in your organization? (N=379, excl. 36 Don't Knows)**



Of course, having stated policies is one thing, but actually enforcing them is another, and if the most popular applications are not actually restricted, widespread circumvention is likely. However, given that we know there is considerable demand for these cloud and SaaS-based services, simply banning them, without providing an alternative business grade system, is short-sighted.

Users will frequently circumvent policies if it helps them get the job done more quickly and effectively, and even where an existing on-premise content management application exists, if it does not provide external access – and mobile access – users will seek alternative applications. Only 23% of those surveyed provide an approved cloud-based sharing or collaboration system.

**Figure 6: What is your official policy on employees using “consumer” cloud-based file-shares and collaboration systems? (Select all that apply) (N=406)**



56% of organizations ban “consumer-grade” file-share and sync services, but only 23% provide an approved “business-grade” alternative.

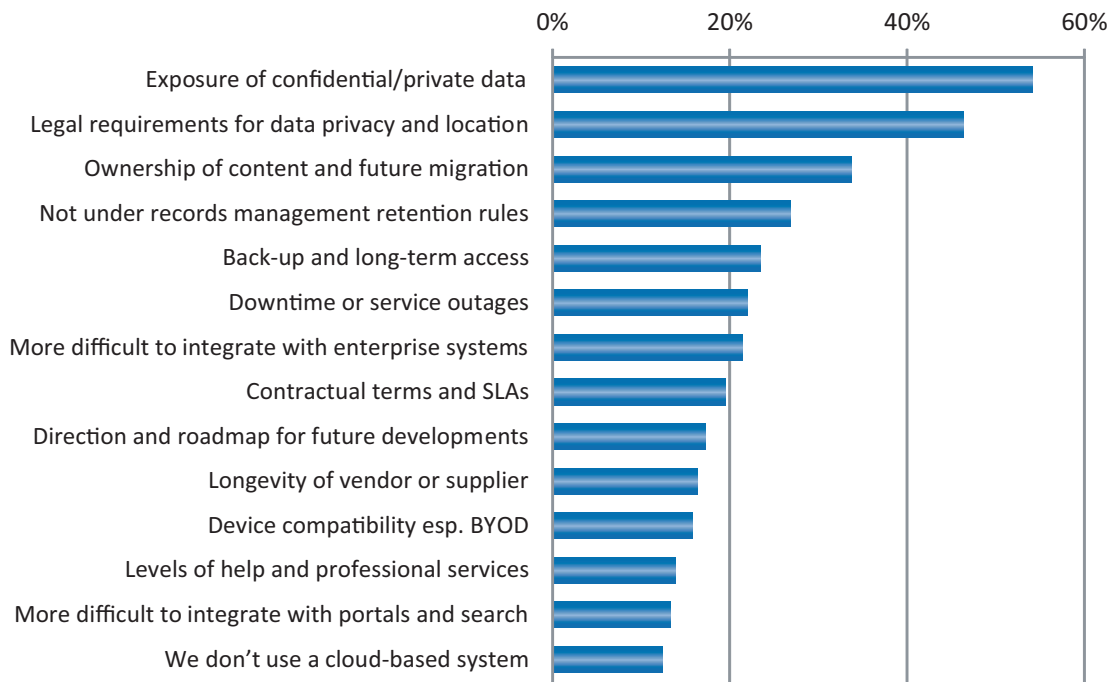
### Concerns

Cloud-based SaaS applications have become prevalent in most businesses these days for a wide variety of applications. Although most do not accumulate large quantities of content per se, they may in fact be holding valuable and mission-critical data. In the case of, for example, cloud-based sales and CRM systems, the sales department need for remote and mobile access has taken precedence over the issues of content security. However, when it comes to specific collaboration-based content, there is a heightened sensitivity to a number of issues, as shown in Figure 7.

The top three concerns can be summarized as “Is the content safe from prying eyes, is it stored in a legally compliant way, and can I get it out if I needed to?” If we play these concerns against the consumer products, compared with those more targeted at the business market, there is no doubt that many of the cloud collaboration products have been adding security features and standards compliance to overcome these issues. Some have focused on data protection and encryption as core features from the start.

Two other content-specific needs are the setting and management of retention periods, and the long term outlook in terms of accessibility, back-up, and cost. After that we see the more generic concerns with cloud services – availability, integration with on-premise systems, and contractual terms, including SLAs (Service Level Agreements).

**Figure 7: Which four of the following do you have most concerns about regarding content that you are currently creating/might create within cloud-based/SaaS collaboration systems? (N=323)**



## Collaboration Systems

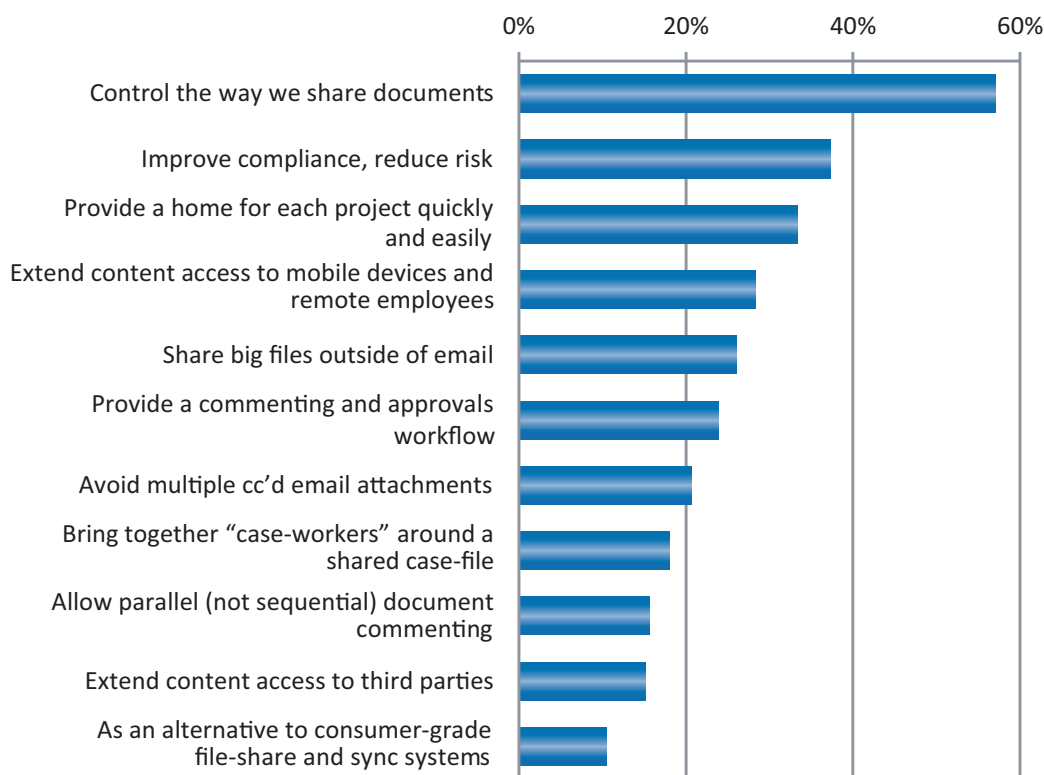
As we will see, many businesses consider their existing on-premise ECM system to be sufficient to support their collaboration needs. Others may well have introduced SharePoint in the first instance as a project collaboration system, but are increasingly using it as an ECM system. In many of those situations, external and mobile capabilities may be limited. 28% of our respondents do not have an ECM/DM system, or are in the process of deploying one (15%).

So in Figure 8, we can see that the same requirements might apply for a formal collaboration system as apply for ECM – namely controlling the way documents are shared, and improving compliance. The third answer is more specifically orientated towards collaboration, and not all ECM systems will have project or team-site capability.

Next we see the mobile and remote access requirement, followed by day-to-day things such as sharing big files, and avoiding multiple copies of email attachments, but also commenting and approvals workflow, and case worker needs. It is worth noting that many of these needs, particularly mobile access, remote sign-offs and sharing large files, create a disproportionate degree of frustration amongst very senior managers, creating extra pressure on IT to provide a solution.

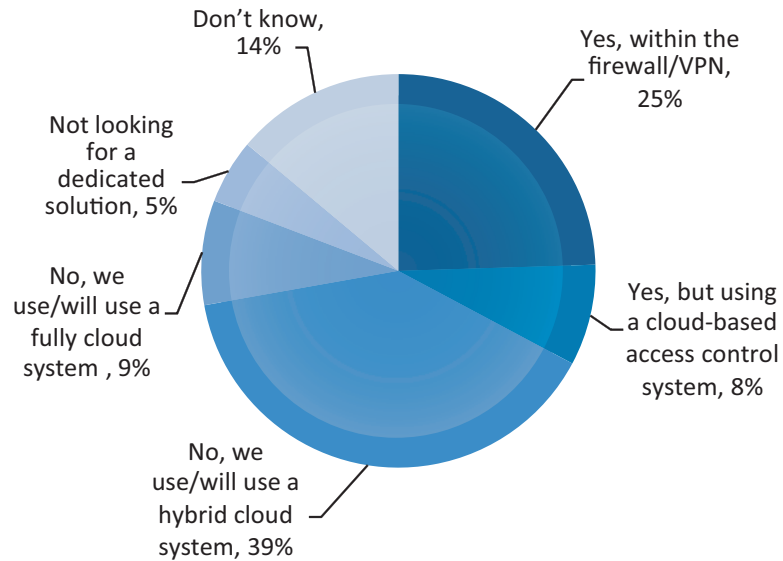
At the bottom comes “providing an alternative to consumer file-share and sync services” – perhaps a naive assumption that these services are not in covert use even at the highest levels.

**Figure 8: What would you say are the three biggest drivers in your organization for adopting a formal collaboration support system? (N=417)**



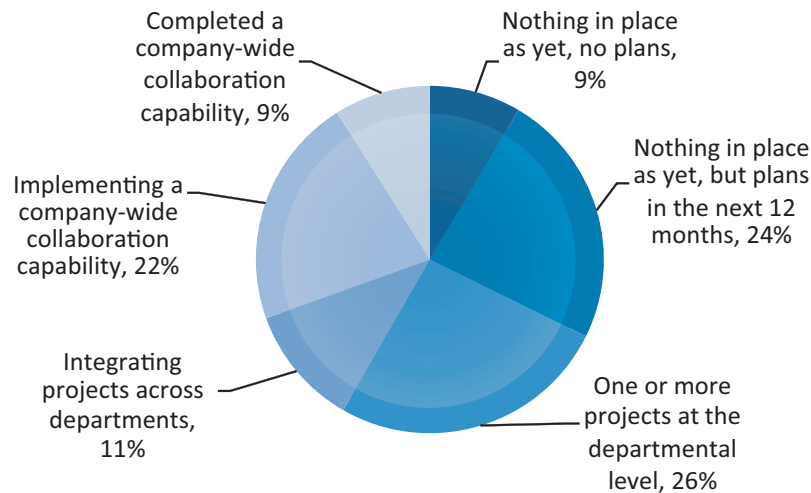
On the whole, our respondents have decided that they will have to embrace the cloud in order to achieve what they need from a formal collaboration system, with only 25% feeling that they do not need to go beyond the firewall. However, only 9% would go to 100% content in the cloud, with nearly 40% looking to put some of their active documents in the cloud and the rest on-prem. A further 8% would utilize the cloud to manage access control while keeping all content behind the firewall.

**Figure 9: Do you feel your collaboration support needs can be met with an on-premise-only solution? (N=396)**



Taking just those who are looking at a collaboration solution with a cloud element, only 9% have completed a company-wide roll out, with 22% implementing right now, and 37% at departmental or multi-departmental level. 24% have plans to move ahead in the next 12 months. All of this suggests that many organizations are moving quite quickly to have something in place.

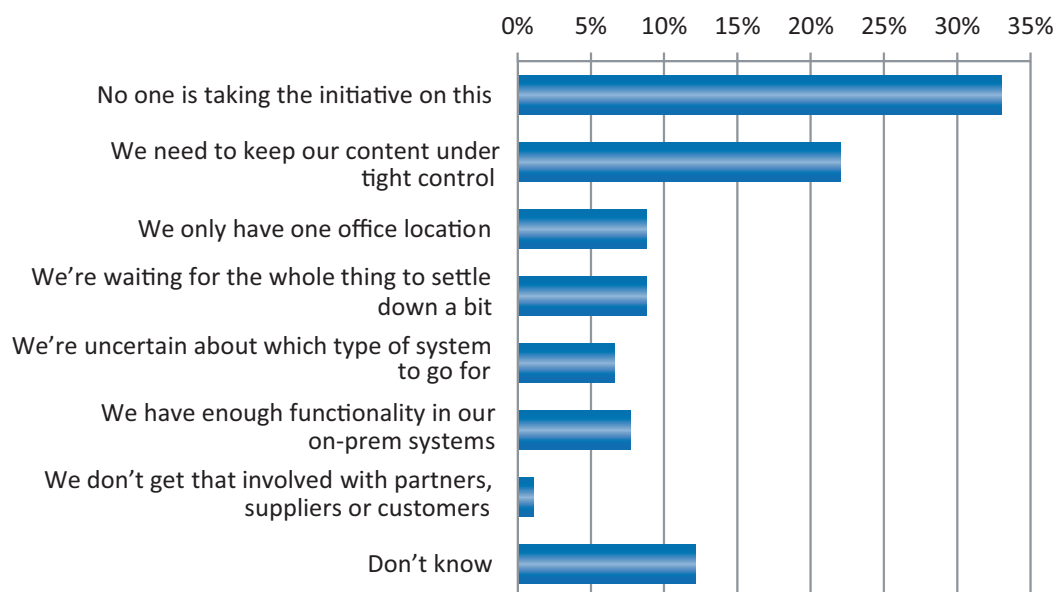
**Figure 10: How would you best characterize the extent of your organization's experience with content collaboration using cloud applications or extensions? (N=223 considering cloud)**



## Non-Adopters

Across the whole survey, 22% indicated that they do not have a formal collaboration system in place, and have no plans, cloud or otherwise. The most likely reason is that no one is taking the initiative – despite the stated need to improve collaboration support that we saw earlier. A somewhat stronger reason comes from the 22% who do not want their content shared around too widely. Confusion is also evident amongst 16%, who see products and market shares changing quite rapidly as the vendors take up strongly competitive positions.

**Figure 11: Why do you have no plans to adopt a formal collaboration system?**  
(N=91 non-adopters)

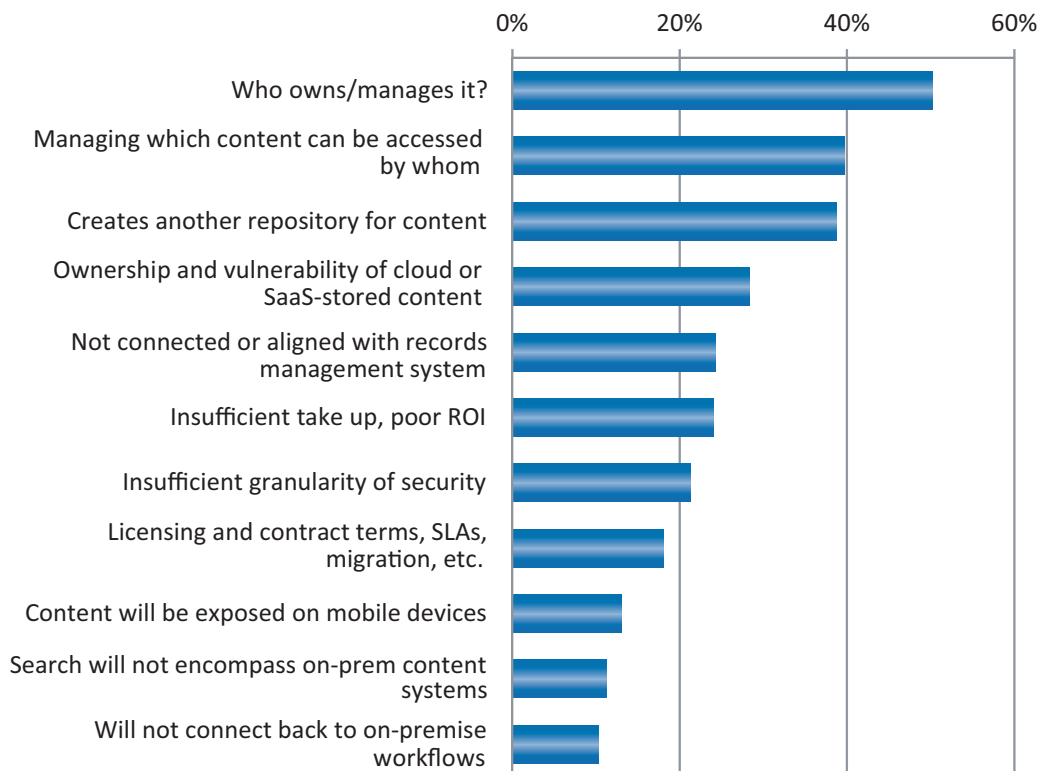


As a follow up to this, we asked all of the respondents who is, or would likely be, the owner or champion for a collaboration system. IT would take the responsibility for 43% of organizations, in particular the Head of IT (28%). Business and departmental heads would take the role for 32%, a situation that can easily lead to multiple overlapping solutions if not coordinated. As we indicated in the introduction, collaboration is so vital to most organizations that responsibility should reside as high up as possible – it sits with the CEO for 10% of organizations. Reflecting the existing owners of the ECM system, 14% see collaboration under the realm of Information Management or Records Managers, perhaps creating a conflict of interest between maximizing the sharability of content, while securing it in a compliant way.

Picking up on those issues, we asked about the biggest concerns around adopting a formal collaboration system. Who owns and manages it is the biggest concern, including managing which content can be accessed by whom. There is also concern, not just from the records managers, about creating yet another repository for content, which is disconnected from the records management system and most likely misaligned with it regarding metadata and retention policies.

It is worth noting that 24% have a concern about user take-up, and how that might affect the ROI. The user experience from a collaboration system is probably more sensitive than most other enterprise systems, and it is certainly true that many of the file-share and sync vendors have put considerable thought into making things easy to use – largely because they have no ability to provide extensive support and professional services back up.

**Figure 12: What are your three biggest concerns regarding a formal collaboration system? (N=417)**

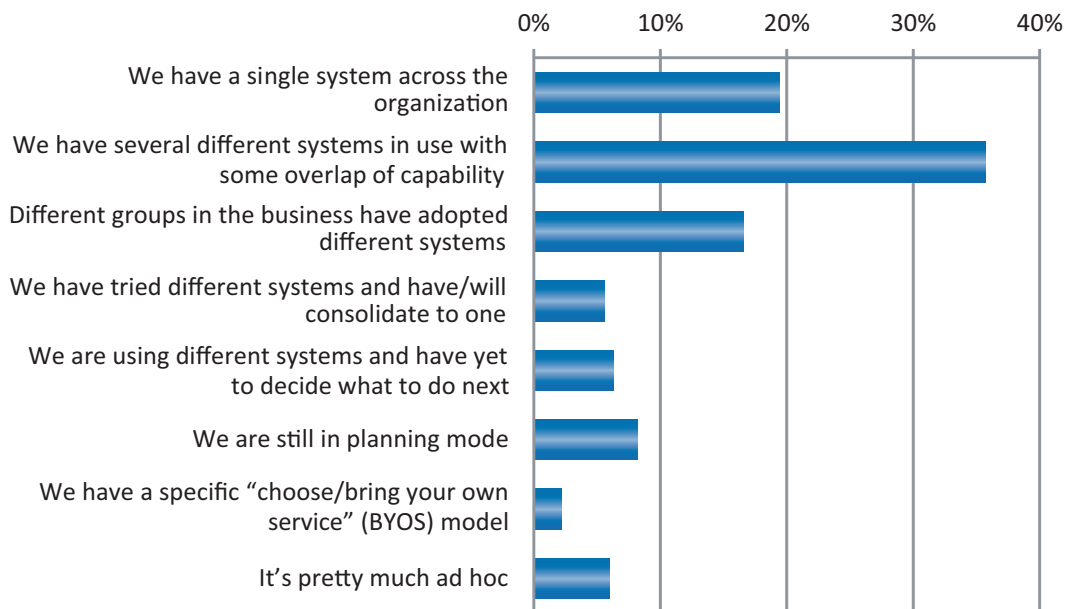


## Deployment Models

As we have already described, the concept of a formal collaboration system has emerged from a number of routes – project collaboration sites, on-premise ECM, cloud ECM, file-share and sync, and social business systems. As a result, many organizations have multiple systems in different departments, and overlapping systems even in the same department. As a fast moving area, organizations are likely to have started out with one or more systems, and perhaps decided it was a good learning exercise. They will now converge to a single system and roll it out enterprise wide – 25% feel they are achieving or can achieve this. However, a larger number, 36%, have different systems in use, with overlapping capabilities.

There is, therefore, considerable confusion on how to best fulfill the range of requirements while still achieving sufficient control, and, of course, carrying the user base along so that they do not stray into unofficial solutions.

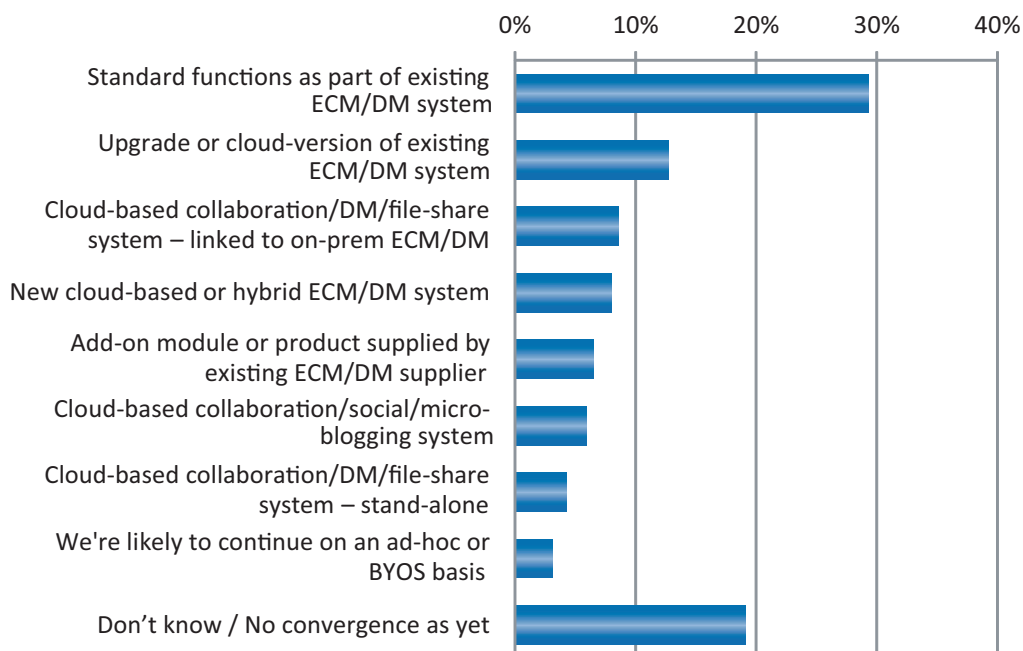
**Figure 13: How would you describe the provision of collaboration systems across your business? (N=319)**



To examine how the different types of solution matched up to the description "main collaboration system" we asked respondents for a view of what their likely strategy might be. Overall, 49% see collaboration as part of their existing ECM system, albeit as an upgrade to a cloud version for 13%, or as an add-on module or product from the same vendor (7%).

Then comes a range of options – 9% favor a cloud-based system linked to their on-prem ECM system, or a completely new cloud-based or hybrid ECM/DM system (8%). The least popular options are to use a dedicated cloud-based collaboration/social/micro-blogging system such as Yammer (6%), or a stand-alone cloud-based collaboration and document management system (4%). 19% have yet to reach a decision or consensus.

**Figure 14: How would you describe the main collaboration system you have or are likely to choose? (N=319)**



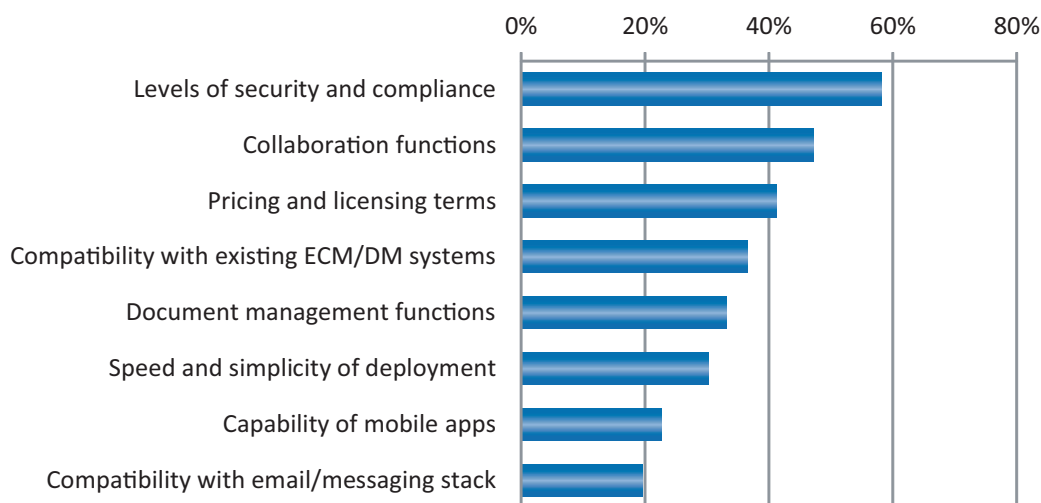


49% of organizations provide, or plan to provide, collaboration support as part of their existing ECM system, with upgrade to a cloud capability if necessary.

## Features for Selection

To examine the thinking behind these strategy choices we asked how the main selection criteria stacked up for choosing a collaboration system. Interestingly, security and compliance comes out above core functions, even for non-records people. Pricing is next, but then compatibility with existing ECM systems.

**Figure 15: What are/would be your main criteria for selecting a cloud/mobile collaboration system? (max THREE) (N=332)**



To break down the feature sets, and throw some light on the functionality that most users would like to converge to, we asked about collaboration and social features, document management features, and mobile features. For each feature, we provided a choice of “Have”, “Would like to have” and “Don’t really need”. The full graphs are shown in Appendix 1.

### Collaboration Features

In summary (Figure A1), 70% of respondents already have: project sites and workspaces; the ability to share files with links; and security linked to Active Directory or LDAP. This most likely reflects the widespread availability of SharePoint in these sites. The difficulty arises with managed access for external users where only 42% consider they have this, compared to a total of 89% who would like to have it. Similarly with mobile apps: only 30% have them, but 83% consider they would be useful. The more social functions, such as blogs, and message feeds with commenting, are least in overall demand.

### Document Management Features

Versioning and check-in/check-out are basic requirements, and are available already for three-quarters of respondents (Figure A2 in Appendix 1). Tasking, workflow and approvals is more of a challenge on existing systems, with only 53% reporting that they already have it, despite it being a near universal need. The same is true for document retention and expiration, not only reflecting a shortcoming of many cloud systems, but also a lack of records management deployment in SharePoint.

Users also want to align their on-premise ECM systems with the collaboration system, not just for content, but also for security settings and metadata structures. Ironically, conscious of the risks once content is exposed to external partners and agencies, 70% of users would like to be able to remove metadata and check for things like comments and review notes – a specialist function available in some collaboration systems.

## Content on Mobile Features

As we might expect (Figure A3) security of content on mobiles is universally required, but only 23% currently have a secure or containerized capability to protect downloaded content on mobiles. Managing the secure access is also an issue, and most would like security settings to track the on-prem or cloud collaboration system.

When it comes to interacting with documents, review & annotation is slightly ahead of editing – both online, and offline editing. Only 20% have any of these capabilities currently – perhaps not a huge problem for smartphones, but a major limitation for tablets.

There are two big issues here, of course. The first is that the most popular tablets – iPads and Androids – are not able to run the standard office applications – Word, Excel and PowerPoint. There are open source or Apple alternatives, but for reviews and annotations, they need to be highly compatible with the Microsoft files. The second issue is that Microsoft has never produced a client for SharePoint: it has always been a browser-based system. Although this browser interface will work on phones and tablets, and cloud versions of the office apps can be invoked for online editing, they are not optimized for touch, and most users would prefer a client app. An app is also easier to secure and containerize than a browser.

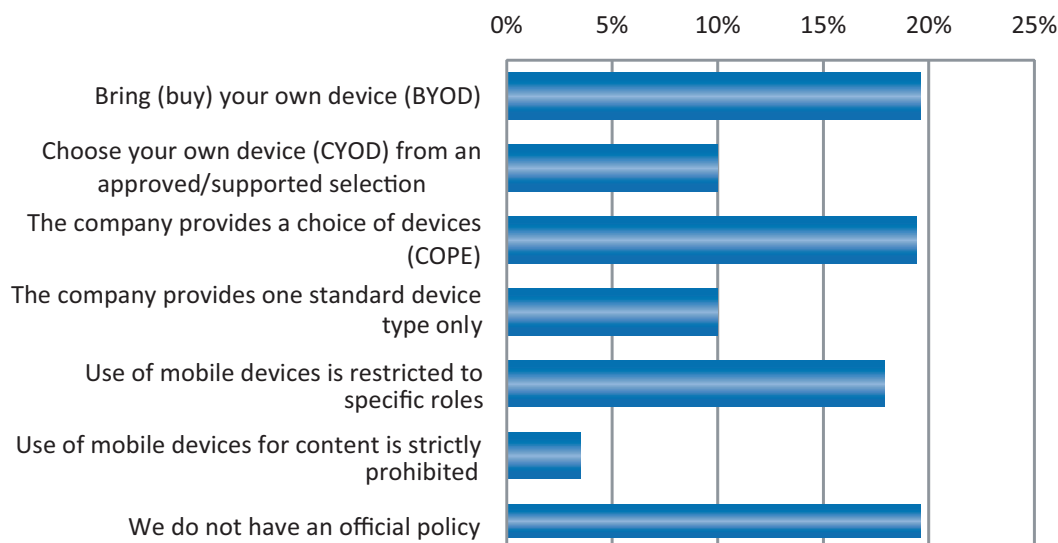
Only 20% of organizations are able to provide document review and editing on mobile devices, even though most would like to be able to do this – in a secure and containerized way.

## Mobile Access to ECM

### Policies

Much has been written about BYOD (Bring Your Own Device) policies. For this survey, we set out to focus on accessing company content on personal devices, rather than email and calendar. 49% allow mixed personal and company use, but only 20% as an outright BYOD where the company has no influence over the choice of device. 10% operate a CYOD (Choose Your Own Device) policy from an approved and supported list as one way to limit support requirements while still expecting users to pay for their own devices. COPE (Corporately Owned, Personally Enabled) is more popular with companies (19%) although not necessarily with employees who may be offered a limited list of devices, and 10% are still only offering one type of device (probably a Blackberry). 22% in our survey restrict mobile devices to specific roles or prohibit accessing company content on mobiles (4%). A worrying 20% still have no official policy.

**Figure 16: Which of these best describes the policy you have in place regarding mobile device use related to company content (other than mail and calendar)? (N=341)**



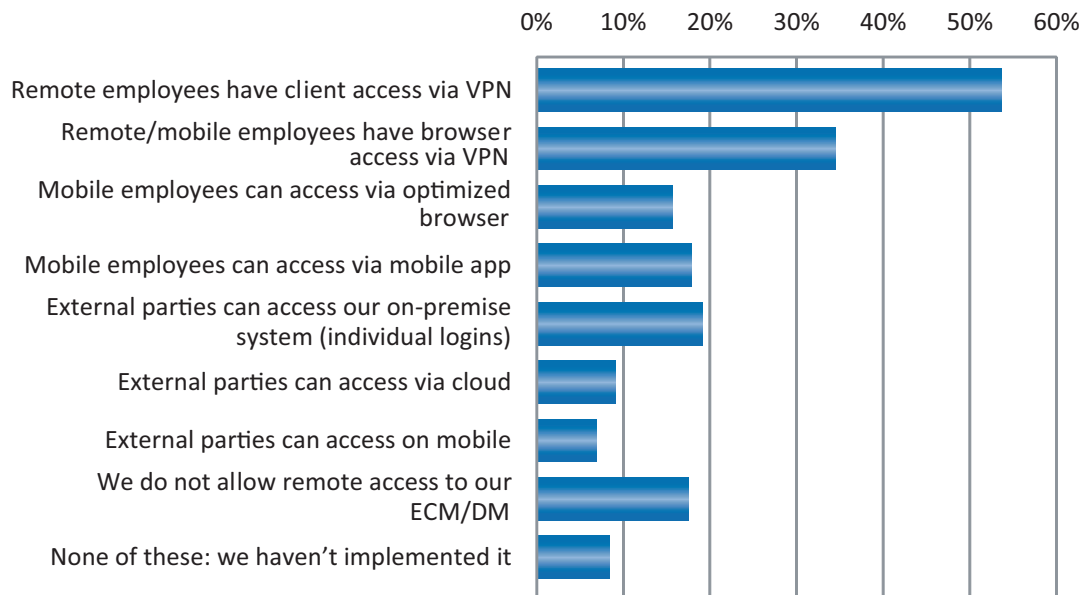
### Remote Access to ECM

Most organizations (74%) have found a way for remote employees to access the ECM system, but for more than half this involves use of VPNs – a notorious support overhead. As we discussed above, browser access is acceptable on home computers, but is an issue for smartphones and tablets, especially if a mobile-

optimized interface is not available. VPN support on mobile devices is even more difficult, and can create security issues back through the corporate firewall.

When it comes to providing access for external parties, 19% have set up additional logins to the on-prem system through VPN, with just 9% providing access through the cloud.

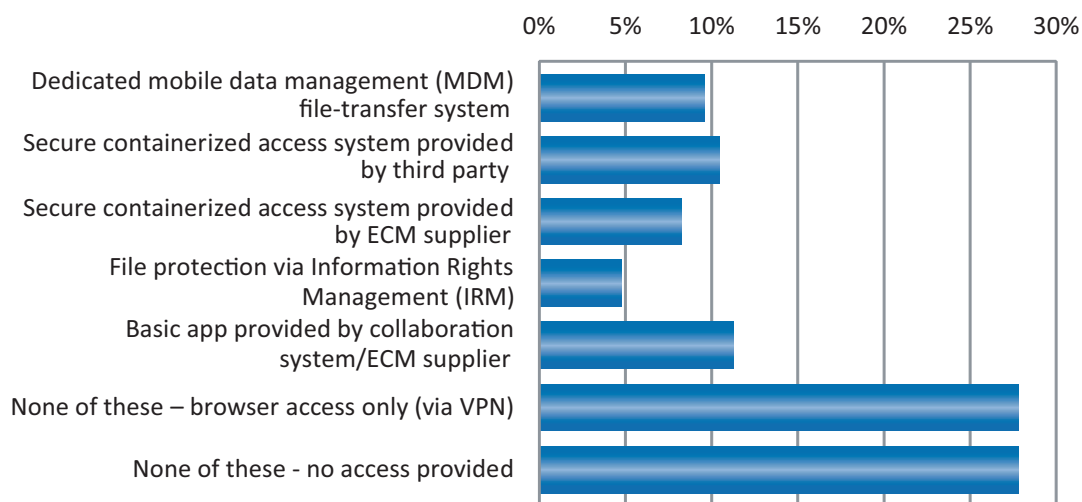
**Figure 17: How would you describe the current availability of your main ECM/DM system to remote/mobile employees and third parties? (Check all that apply) (N=319, excl. 21 N/A)**



## Mobile Security

A full discussion of mobile security is outside of the scope of this report. Beyond the 28% who do not allow mobile access at all, a further 28% only allow browser access, so no content is downloaded to the device itself. Of the remainder, 20% are using a dedicated mobile data management (MDM) system or a secure containerized access system from a third party. 19% are using an app supplied by the collaboration system or ECM supplier. Of these, half feel the apps are somewhat basic, with limited levels of security.

**Figure 18: Do you use any of the following to secure content on the mobile device or in transit? (N=329)**

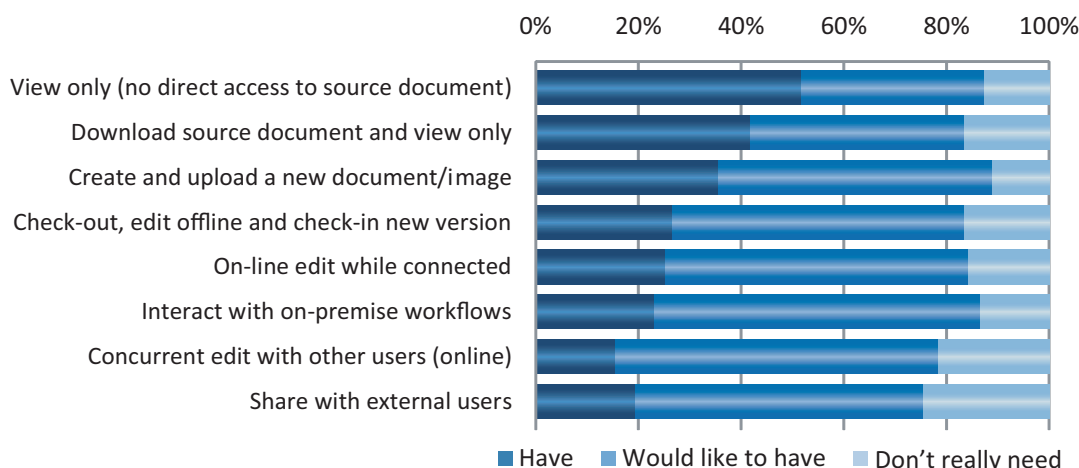


## Content Functionality on Mobile

Our respondents are fairly demanding when it comes to what they want to do with content on their mobile devices with 80% ticking almost all of the features listed in Figure 19. However, they are rather poorly served at present with around half having view-only access, a third able to create an upload a document, and only

a quarter having any real editing capability. 79% would like to interact with on-premise workflows, but only 21% are currently able to do so.

**Figure 19: When connected to the main ECM/DM system using a mobile device (tablet or smartphone, NOT laptop), which of following basic content functions are readily available? (N=340)**

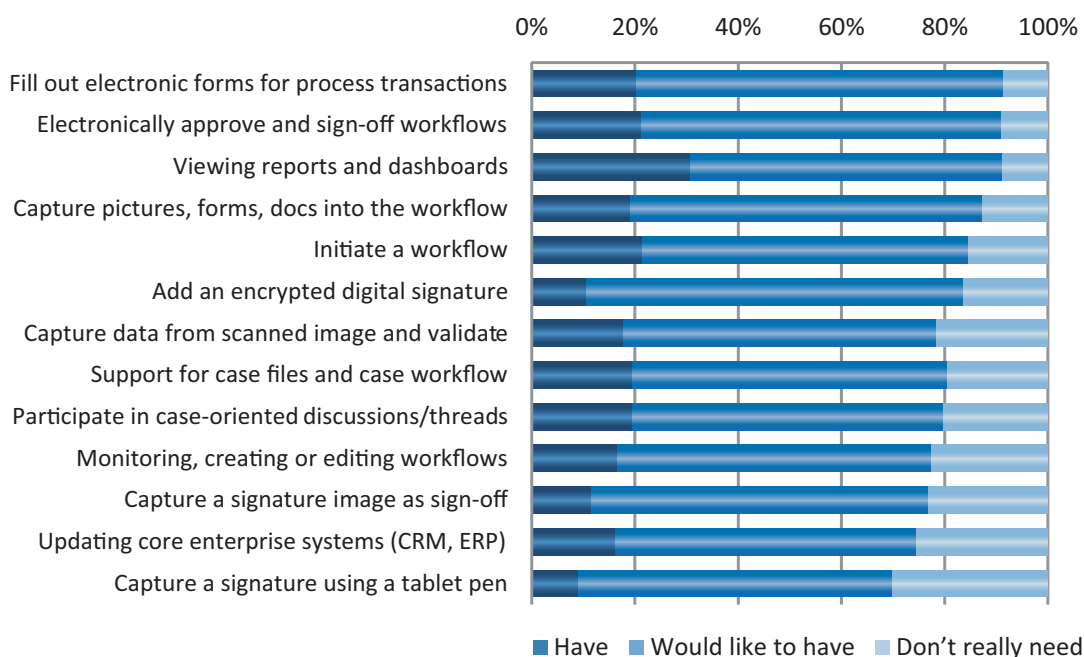


Only 50% of organizations provide mobile access to content while on-the-move, with only 25% able to offer any degree of editing or review capability.

### Process Functions on Mobile

Content access is just one small part of how mobile devices can interact with back-end processes to improve collaboration, and increase productivity. Our respondents signed up to a long wish list of possibilities (Figure 20) but actual availability ranges from 30% who are able to view reports and dashboards down to 10% who are able to use a digital signature to sign-off on a process step – or even capture a signature using a tablet pen (8%). In between, around 20% are able to initiate workflows, perhaps by capturing pictures, forms and documents, although this drops to 16% when it comes to monitoring or interacting with workflows.

**Figure 20: Which of the following process functions would you like to be available from mobile devices? (N=321)**

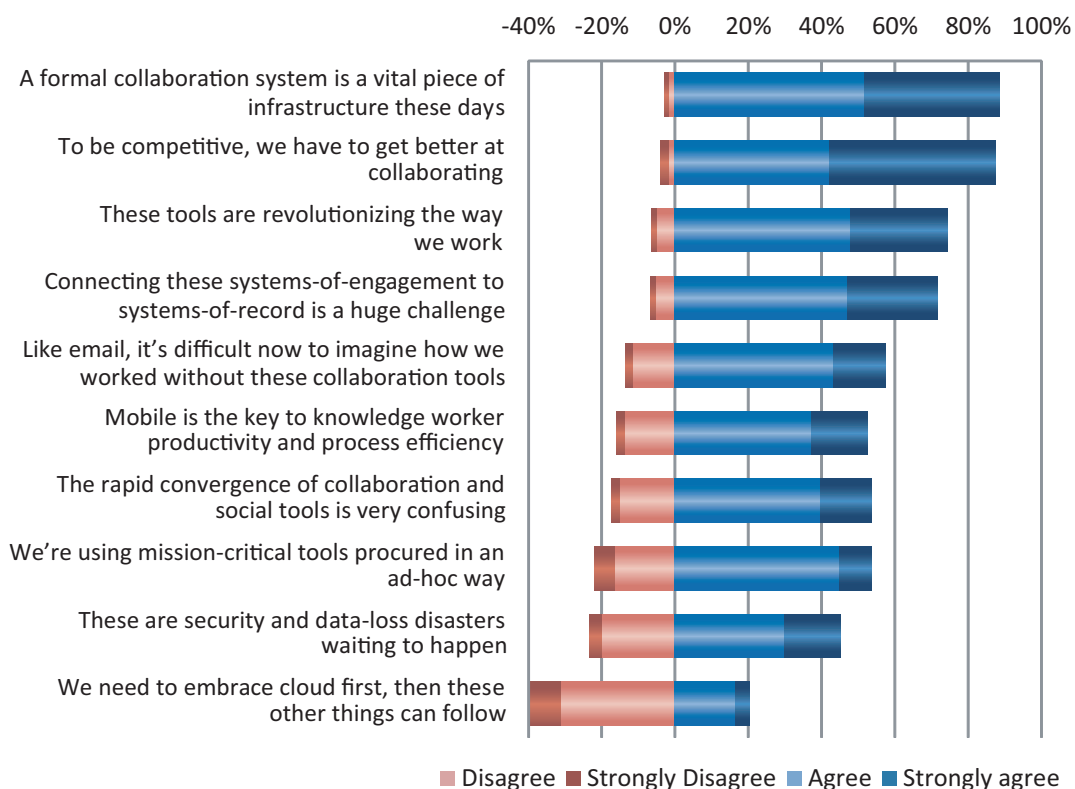


## Opinions

Our respondents are somewhat unanimous in their view that a formal collaboration system is a vital piece of infrastructure, enhancing competitiveness and revolutionizing the way we work. They are also keenly aware that connecting these systems of engagement to our systems of record is a huge challenge. On balance, there is a feeling that the rapid convergence of collaboration and social tools is very confusing, and that some adoption or buying decisions are being made in an ad hoc way - the “let’s try it and see how we get on” syndrome. This in itself can reflect into potential security and data-loss disasters if a full evaluation is not made, and an experienced administrator given ownership.

On the whole, most respondents are keen to see knowledge workers supported on mobile devices, and feel this will enhance productivity and process efficiency. The only statement that shows a net disagreement is that cloud is the only way to go for effective collaboration.

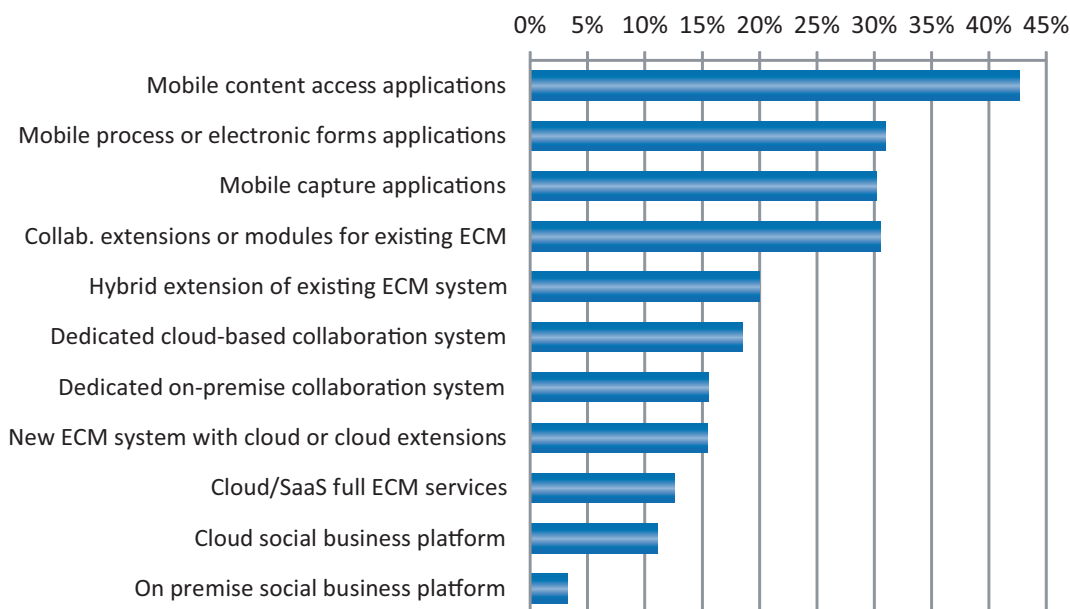
**Figure 21: How do you feel about the following statements?**  
(N=332. Line length reflects “Neither agree nor disagree”)



## Spend

Mobile content access applications are showing the biggest relative growth based on spend intentions for next year followed by mobile process, mobile forms and mobile capture. The next grouping includes various options of collaboration, of which modules or extensions of existing ECM come highest, followed by hybrid extensions and full cloud-based systems, and then dedicated on-premise systems. 15% of our survey respondents are looking to spend on a new cloud-oriented ECM system.

**Figure 22: How do you think your organization's spending on the following products and applications in the next 12 months will compare with what was actually spent in the last 12 months?**  
(N=316, Net "More" - "Less", line length indicates "We don't spend anything on this")



A net of 43% of the organizations polled plan to spend more on mobile content applications next year, and 31% plan to spend more on mobile process, mobile capture and electronic forms applications.

## Conclusion and Recommendations

Collaboration is undoubtedly a fundamental requirement for business success and in most cases will include external partners and third parties as well as internal staff. IT support for collaboration both within and beyond the fire wall has taken a big step forward, driven by the success of cloud-based file-share and sync services. These services are easier to link up with third parties, and are usually supported by powerful and easy to use mobile apps. However, many are still only at "consumer-grade" when it comes to access security, security on the device, and connectivity with on-premise systems

If collaboration "owners", and we have seen that this is likely to be business and project heads as it is the IT department, do not provide flexible and easy-to-use collaboration functionality across the business, then users will turn to these unsanctioned products. Many existing ECM/collaboration systems have become somewhat less agile than needed when it comes to collaboration outside of the business walls, and indeed, many do not readily offer cloud extensions and mobile support.

On the other hand, we have found that most users would like to create hybrid cloud solutions as an extension of on-premise ECM/collaboration systems, so that user access, classification, retention policies, and process workflows can be synchronized across cloud and mobile access. These issues certainly play a part in deciding on future ECM strategies, although we have found that there is considerable confusion around the whole social, cloud, collaboration, mobile access area. It would certainly seem to be a potent factor when looking at consolidation of existing ECM systems - or completely new products.

### Recommendations

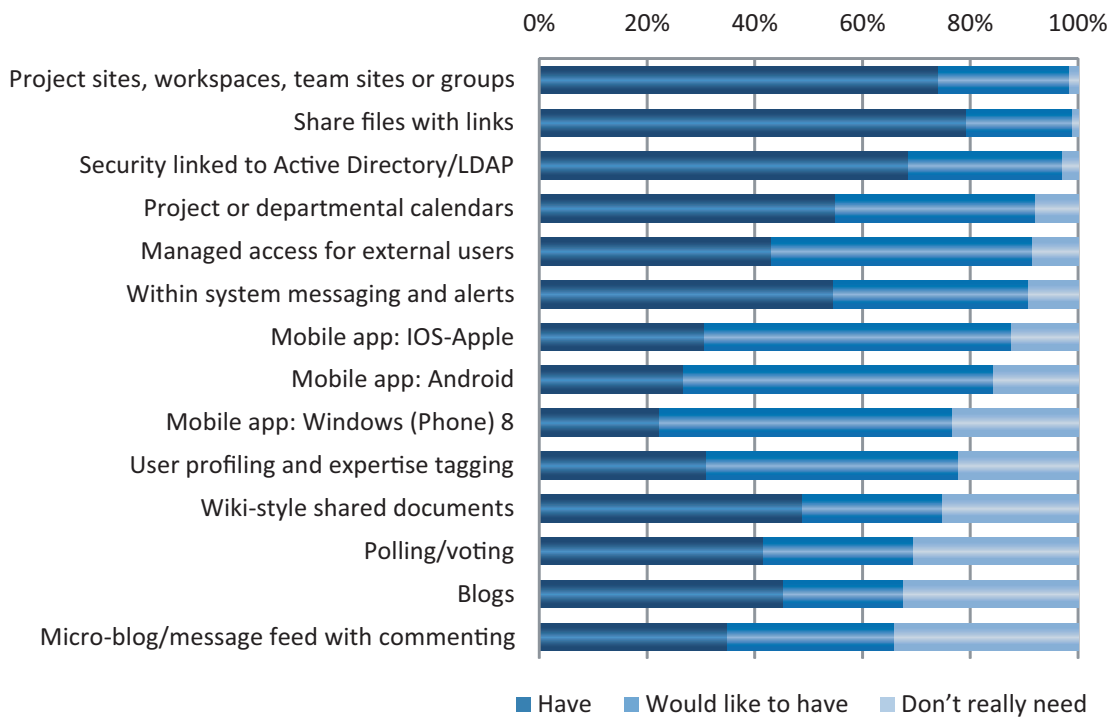
- Be aware of those areas of your business where collaboration is crucial, and focus in particular on collaboration with external partners and third parties.
- Assess the degree of technical support that you are providing, with reference to the functions, facilities and above all, simplicity of many modern collaboration and ECM systems.

- Look at the support within your current collaboration or ECM system for external and mobile users, and check out the future roadmap, particularly with regard to secure cloud and hybrid cloud. Hybrid offerings may be easier to “sell” internally, but the join between on-prem and cloud should be as seamless as possible.
- Be aware that many people in your organization are likely to be using consumer-grade cloud-based file-share and sync offerings. Consider introducing an approved and supported business-grade system, possibly as an interim, but ensure that it has strong security options and user access controls. You should also check that you can readily back data out of it in the future, and/or that you could synchronize it with your on-premise system if required.
- If you are looking for a long-term cloud collaboration solution, look beyond basic content access on mobile devices. Look for containerized security, capture and edit, review and annotate functions, and interoperability with back office processes.
- Remember that stand-alone cloud collaboration and content management solutions will add an additional repository to manage for user access, classification, taxonomy, retention, and hold. The ability to align with on-premise systems would help here, but check out third-party cloud extensions to popular on-premise systems, as well as stand-alone cloud systems that offer a range of connectors.
- Avoid creating in-house developed mobile environments. Productized solutions from existing ECM, collaboration and process-interface vendors, on-premise or cloud, will be much easier to support across current and future mobile devices, and are less likely to have security loopholes.

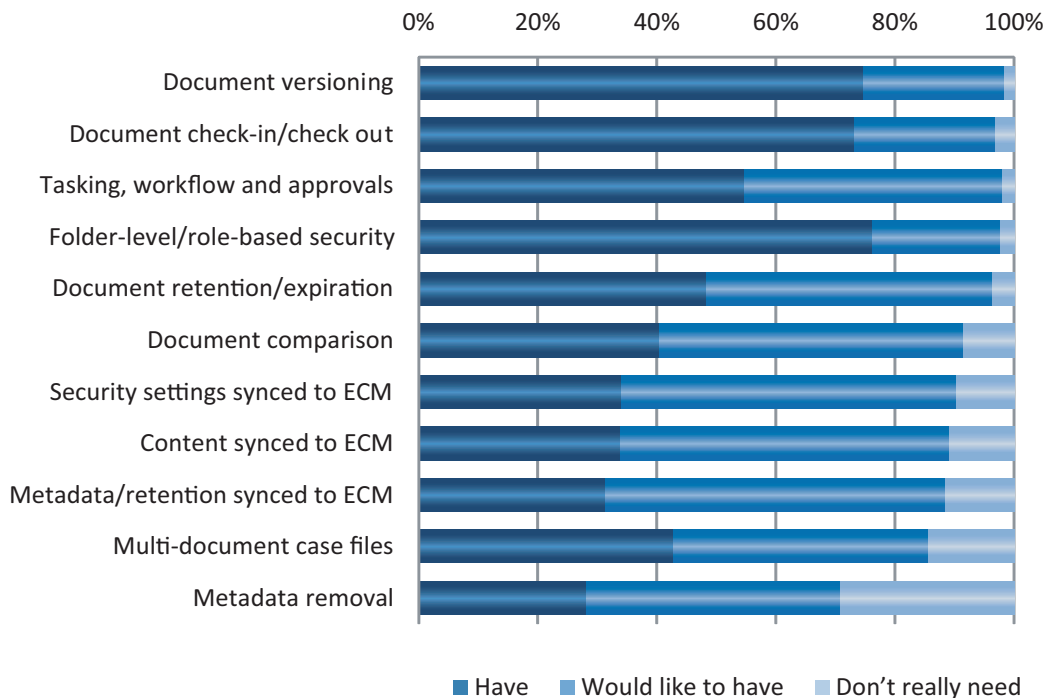


# Appendix 1: System Features

**Figure A1: Looking at the main collaboration system described above, which of the following collaboration/social features do you use/need? (N=322)**

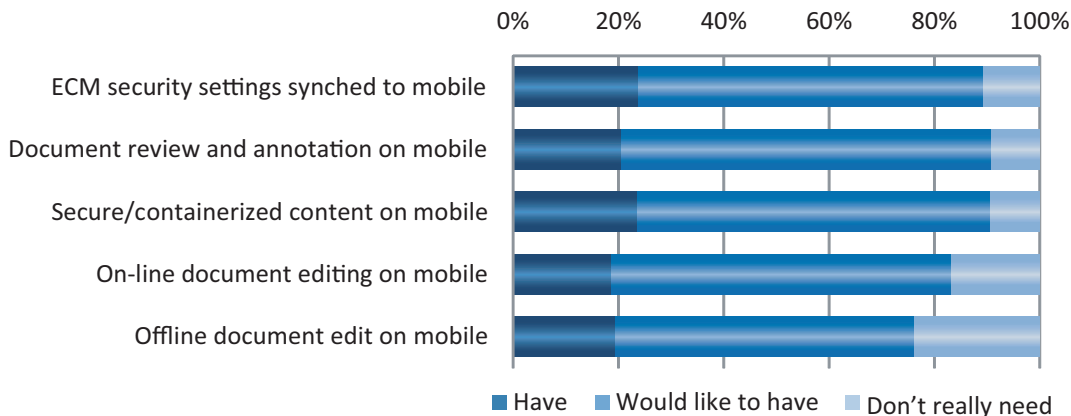


**Figure A2: Looking at the main collaboration system described above, which of the following document management features do you use/need? (N=322)**

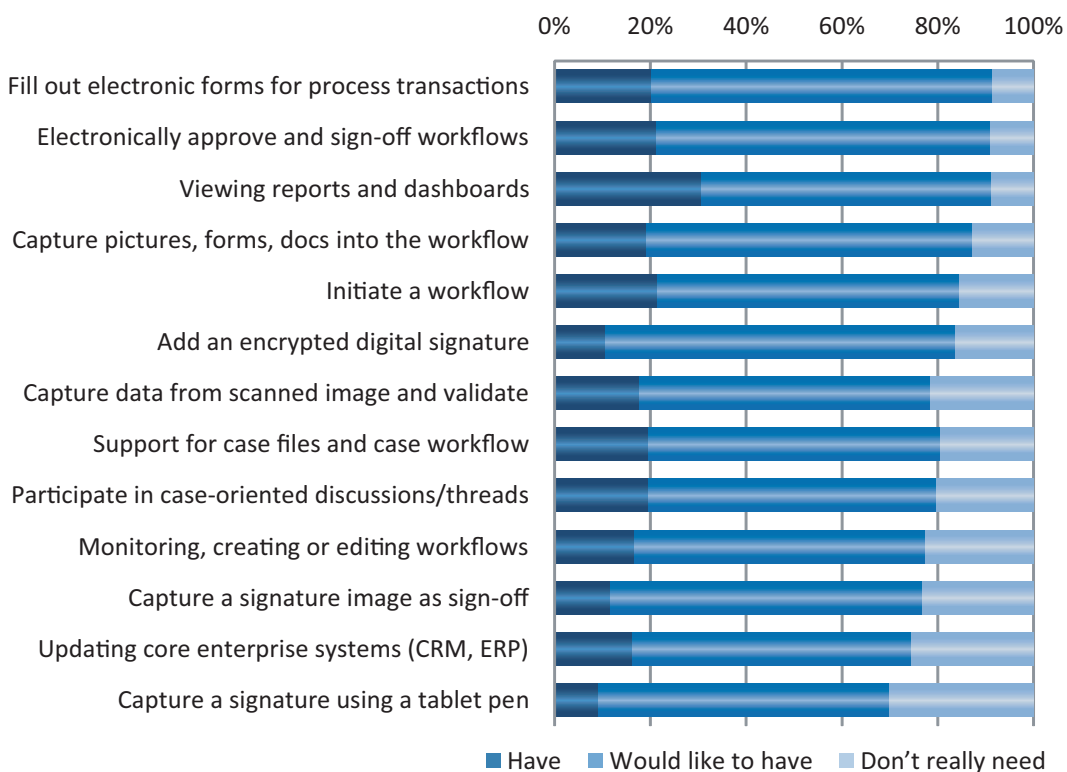




**Figure A3: Looking at the main collaboration system described above, which of the following document on mobile features do you use/need? (N=322)**



**Figure A4: Which of the following process functions would you like to be available from mobile devices? (N=322)**



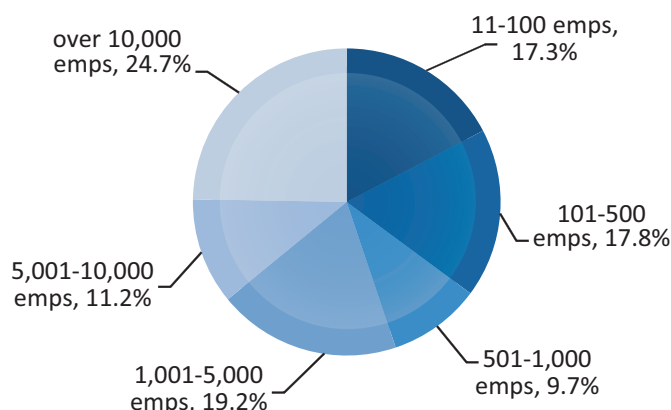
## Appendix 2: Survey Demographics

### Survey Background

464 individual members of the AIIM community took the survey between Jan 24, and Feb 11, 2014, using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 80,000 AIIM community members.

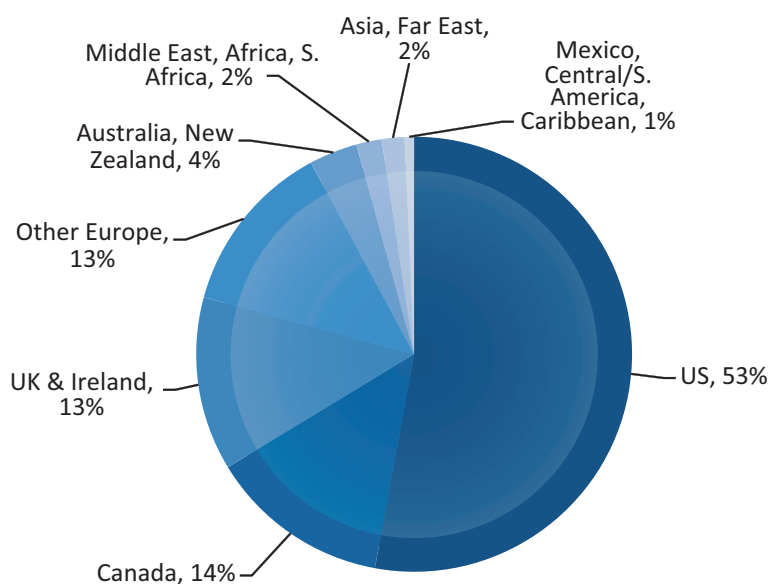
### Organizational Size

Survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 26%, with mid-sized organizations of 500 to 5,000 employees at 29%. Small-to-mid sized organizations with 10 to 500 employees constitute 35%. Respondents from organizations with less than 10 employees have been eliminated from the results. Suppliers of ECM products and services have been included as they are valid mobile users.



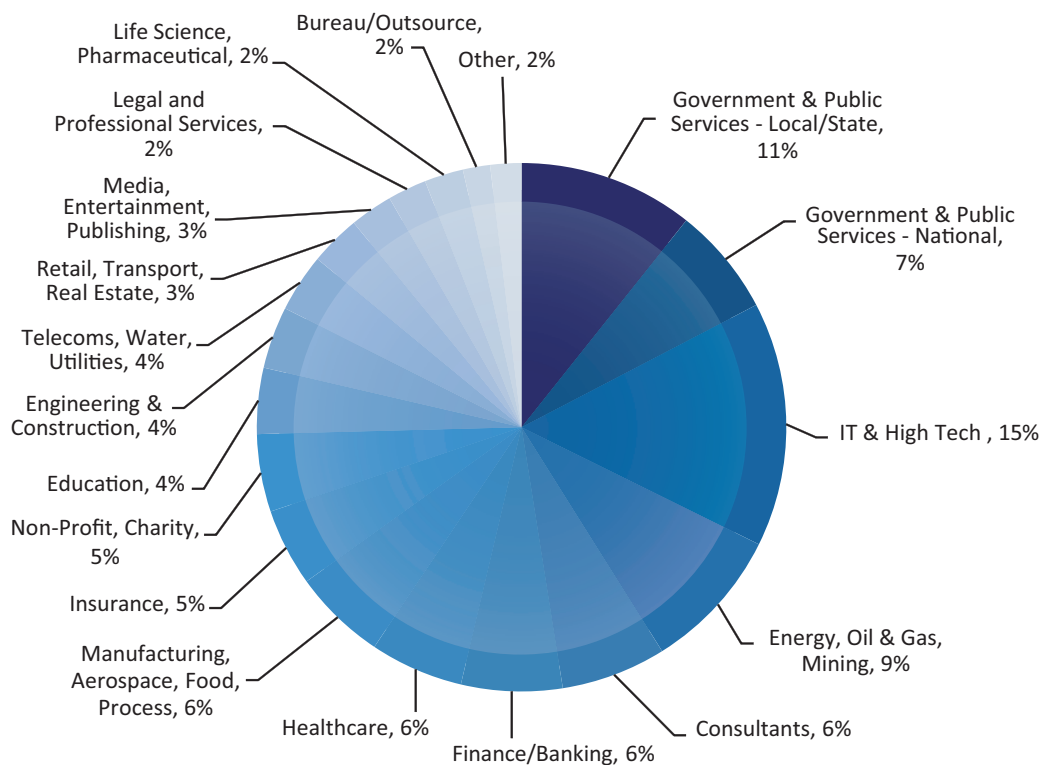
### Geography

73% of the participants are based in North America, with 17% from Europe and 11% rest-of-world.



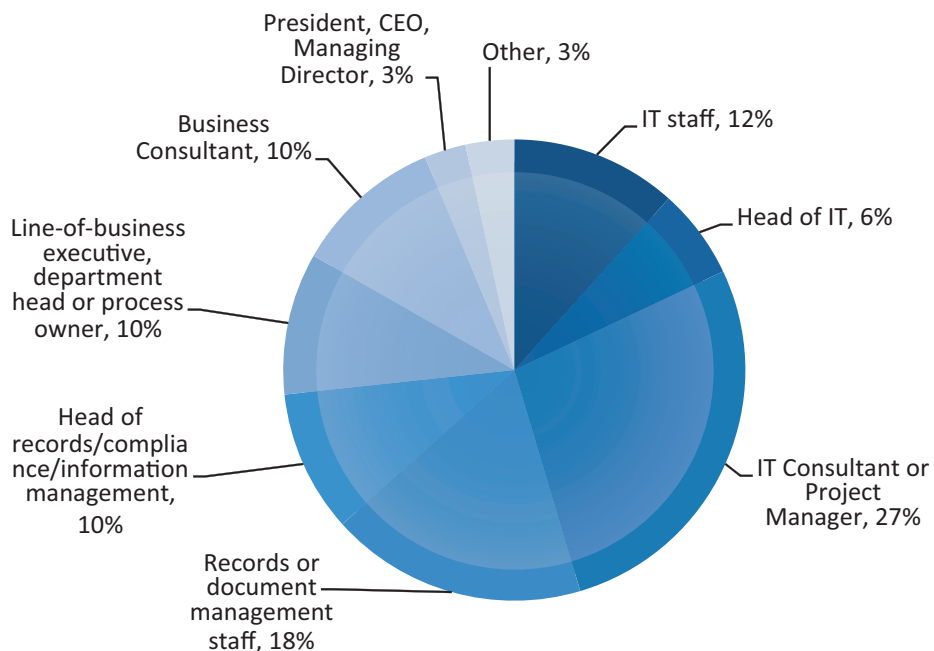
## Industry Sector

Local and National Government together make up 18%. IT and High Tech 15%.



## Job Roles

45% of respondents are from IT, 28% have a records management or information management role, and 26% are line-of-business managers.



## Appendix 3: Selective Comments

Do you have any general comments to make about your collaboration projects? (Selective)

- The lines are blurring. Traditional ECM systems are having a hard time to integrate with cloud solutions as the ECM developers have little access to other clouds.
- In general our business leadership just doesn't understand the needs. They themselves would rather just use email.
- Collaboration allows individuals with complementary or overlapping areas of expertise to create better results faster than before.
- We are in the midst of testing additional collaboration tools, hybrid cloud options.
- The Cloud does not provide the only solutions.
- Collaboration has made tremendous improvement for us; ideation, communication and cost efficient information storage meeting governance and regulatory requirements.
- They are developing and moving too quickly for large organizations with lots of heritage infrastructure and processes.
- I think the term "collaboration" is too woolly. We don't need to launch into discussion on documents, we just need to be better at sharing, tracking versions, and remote access.
- Collaboration and ability to bespoke workload via mobile devices is the way forward

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