

**INSIGHT**

State of Information Management: Are Businesses Digitally Transforming or Stuck in Neutral?

In partnership with:

Hyland®

Introduction

In our earlier report, “2017 State of Information Management: Are Businesses Digitally Transforming or Stuck In Neutral?” we reported that businesses were taking a more holistic approach to digital transformation initiatives with 55 percent of those polled indicating they have or are planning to implement cloud as part of their overall strategy. We also found that these initiatives are being led by corporate executives and IT but, in fact, are delivering the best results when they are addressed as cross-departmental efforts involving multiple parties.

In this new report, we’ve extracted several highlights from the original. We’ve also included the full report to provide a complete picture. Our focus is to showcase key areas of importance and present best practices as seen firsthand from our underwriter’s experience in working with various clients around the globe.

The Driver for Digital Transformation

When discussing drivers for digital transformation, AIIM Research finds that 55 percent of respondents reported costs and productivity as their biggest driver for digital transformation, while 53 percent reported improved information sharing and collaboration, and 30 percent focused on improving their customer service capabilities.

One of the best ways to accomplish this is with the approach indicated by 26 percent of respondents: They take a more holistic approach to digital transformation by integrating their projects across departments, creating a more integrated information ecosystem and breaking down information silos.

Leaders of Digital Transformation

When looking at who is leading the way in digital transformation, 39 percent of respondents say these projects are led by IT departments while 31 percent tell us their projects are being led by their corporate executives, giving them the much-needed top-level support.

The greatest success comes when the organization develops a cross-functional team dedicated to digital transformation projects, enabling business and IT executives to better understand operational issues and uncover potential ways of working together. In some organizations, there may be a Digital Transformation Officer position – someone who takes the lead and responsibility for these initiatives.

Cloud Adoption

Cloud is essential for accessibility and migration is always a key topic. When it comes to migrating content to the cloud, 29 percent of those polled feel their organizations are outlanders, falling behind the rest. However, when looking at cloud deployment, 25 percent say they have done so to a degree, while 30 percent say they are in the process of a cloud deployment.

Although nearly a third of respondents indicate they are still struggling migrating information to the cloud as part of their overall transformation process, there is great opportunity to extend and enhance the information ecosystem using cloud applications for all businesses, enabling remote workers and clients to access content and information of all types more readily.

Conclusion

Digital Transformation is a reality, embraced and adopted by some, best served by those who plan for it. When corporate executives and IT work together to understand and plan how they could benefit from digital transformation, the greatest value and benefits are realized. In the next section, we will present some best practices to help position and align some of the key elements needed to succeed in a digital transformation journey.

Best Practices Insights – From Our Underwriter

Digital transformation is more of a mindset shift than any one technological investment.

The most effective approach to digital transformation is one of taking a holistic view across the entire end-to-end process.

1 What do you recommend for gaining support throughout the organization?

Develop a clear digital transformation vision to be shared across the company and form a cross-departmental transformation team to act as champions. This vision should present:

- How the organization will change (both IT and business side)
- Why the change is needed
- What the impact will be to the individuals in the company
- How it will change various business processes and customer service initiatives

2 Where should we begin our digital transformation journey?

Start small, and build on early wins. Identify a key business process that could benefit from digital transformation – either a heavily manual, paper-based process or one plagued with silos that hinder collaboration and customer service. Identify the people, information and steps involved, using your findings to create a plan for transformation. Share results of the initiative (hard and soft ROI) with key stakeholders, highlighting how they align with the overall vision. Collaborate to determine the next most pressing process to tackle.

3 How do we deal with those people who are reluctant to change?

The human factor is typically the greatest challenge in any transformation. Even the best digital transformation project will fail if your people aren't part of the discussion. The key is to get them involved early through clear communication, education and training. Doing so helps ensure positive results, preventing disruption from occurring in upstream and downstream processes.

4 As we look to move to the cloud, what do you recommend to ease the transition?

Many organizations are growing to understand that a secure cloud solution not only can save them time and money, but also provide stronger security features, better functionality and larger storage capacity. As you look to move to the cloud, identify industry peers that can serve as references, make sure your key business and IT stakeholders are part of the planning and highlight the tremendous value that managing content in the cloud can provide – including disaster recovery, on-the-go remote access and increased uptime.

5 How will we know we are on the right path to digital transformation?

As transformation takes hold and processes become more automated, content will begin to drive itself. As it is captured, identified, and stored into one or more repositories, information in context triggers workflows and finds its way to the appropriate personnel or groups for action. Increased efficiency, employee productivity and customer service follow.

6 When will our digital transformation journey end?

A true digital transformation journey never ends; it continues to evolve and improve over time, as business needs change and new technologies emerge. The initiative you are undertaking today may end, but this should be the beginning of an ongoing practice of continuous improvement to take your business to the next level.

For more tips and resources, visit onbase.com/digital-transformation.

About Our Underwriter



About Hyland

Hyland is a leader in providing software solutions for managing content, processes and cases for organizations across the globe. For over 25 years, Hyland has enabled more than 19,000 organizations to digitalize their workplaces and fundamentally transform their operations. Named one of Fortune's Best Companies to Work For® since 2014, Hyland is widely known as both a great company to work for and a great company to do business with.

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About AIIM

AIIM has been an advocate and supporter of information professionals for over 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



Bob Larrivee is Vice President and Chief Analyst of AIIM Market Intelligence. Internationally recognized as a subject matter expert, and thought leader with over thirty years of experience in the fields of information and process management, Bob is an avid techie with a focus on process improvement, and applying advanced technologies to solve business problems, improve business processes, and automate business operations.

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

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STATE OF INFORMATION MANAGEMENT:

**Are Businesses Digitally Transforming
or Stuck in Neutral?**

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About the Research

As the non-profit association dedicated to nurturing, growing and supporting the information management community, AIIM is proud to provide this research at no charge to our members. In this way, the entire community can leverage the education, thought leadership and direction provided by our work. We would like these research findings to be as widely distributed as possible. Feel free to use individual elements of this research in presentations and publications with the attribution – “© AIIM 2017, www.aiim.org”. Permission is not given for other aggregators to host this report on their own website.

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

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TABLE OF CONTENTS



ABOUT THE RESEARCH	2
PROCESS USED AND SURVEY DEMOGRAPHICS	4
ABOUT THE AUTHOR	4
ABOUT AIIM	4
INTRODUCTION	5
KEY FINDINGS	5
DISCUSSING DIGITAL TRANSFORMATION	8
IN GENERAL	8
PUTTING THE PIECES TOGETHER	12
INFORMATION MANAGEMENT PRACTICES	12
PUTTING THE PIECES TOGETHER	16
INFRASTRUCTURE	16
PUTTING THE PIECES TOGETHER	20
PROCESS	20
PUTTING THE PIECES TOGETHER	24
SOCIAL, CLOUD, AND ANALYTICS	24
PUTTING THE PIECES TOGETHER	26
OPINIONS AND SPEND	26
PUTTING THE PIECES TOGETHER	29
CONCLUSIONS & RECOMMENDATIONS	29
RECOMMENDATIONS	30
APPENDIX 1: SURVEY DEMOGRAPHICS	32
APPENDIX 2: OPEN-ENDED COMMENTS	34
DEVELOPED IN PARTNERSHIP WITH	35

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ABOUT THE RESEARCH

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 collecting responses from 686 individual members of the AIIM community during the month of January of 2017. Invitations to take the survey were sent via e-mail to a selection of the 195,000+ AIIM community members and through various social media outlets. Survey demographics can be found in Appendix 1.

About AIIM



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Introduction

As private and public organizations move to adopt and implement the latest technologies to build out their information management ecosystems and digitally transform their operational processes, there are challenges to be overcome in extending the capabilities—once confined to the desktop—beyond the corporate walls to comprehensive transactional processes.

When considering progress toward digitally transforming business organizations, fifty-five percent of the folks we polled seem to be bound by cost and productivity as a key driver, indicating that, though these are valid reasons, they are more tactical than strategic. Conversely, fifty-three percent of respondents appear to be more forward thinking in their digital transformation efforts, citing better ways to improve their information sharing and collaboration capabilities as a key driver. This could be viewed as a dividing line between the Trailblazers who typically look ahead even in times when tactical efforts are required, and those who are Citizens in a sort of neutral position, or Outlanders who are really lagging behind in their digital transformation efforts.

It is important to remember that “digital transformation” involves more than just technology. The people and process elements are also vital to successful digital transformation. Our survey bears this out, with seventy-one percent of respondents indicating that governance has an important role in digital transformation, especially where cloud use is concerned. They contend that, without governance of some sort, cloud use would become a chaotic mess as workers are left to their own devices. We also found that the human factor remains the most challenging element for project success.

Respondees were asked to assess their digital transformation status against several factors: being paperless, using multi-channel inbound capture, and the impact digital transformation will have on individuals, business organizations, and operational processes. What we found is that there is progressive movement, albeit not the hockey stick inclination hoped for, but movement nonetheless.

Some of the terms used in this report include:

IM: Information Management	IG: Information Governance
ECM: Enterprise Content Management	DM: Document Management
ERM: Electronic Records Management	CA: Content Analytics
DAM: Digital Asset Management	DT: Digital Transformation

Persona used include:

- **Trailblazer** – Exceptional capabilities; ahead of the pack in respective market space or among peer groups
- **Citizen** – Average capabilities; on an equal level compared to competition and peer groups
- **Outlander** – Below average capabilities; behind the times, typically waiting until the last minute to implement change

Key Findings

In General

- **Twenty-four percent of respondents report that many of their processes are completely digital.** Twenty-six percent are integrating projects across departments.
- **Fifty-five percent of respondents cite costs and productivity as their biggest driver for Digital Transformation.** Fifty-three cite improved information sharing and collaboration.
- **Twenty-nine percent of respondents are formulating Information Governance (IG) policies for decision making with 27% indicating they make decisions based upon their established IG policies.** Twenty-eight percent say they have no accepted IG policies.
- **Chaos is the description used by 23% of respondents in relation to governance and management of multi-channel inbound information.** For 24%, they see themselves as having well defined practices with 23% indicating they use a value-based approach to selective archiving.
- **Outlander is the label 29% of respondents placed upon themselves in relation to cloud migration.** When it comes to implementing new systems and processes, 25% call themselves Trailblazers, as do 23% with regard to mobile and remote access improvements.

KEY FINDINGS

Infrastructure

- **Enhanced automated processes and workflows are in place among 18% of respondents with an additional 42% citing they are in the process of doing so.** When looking at cloud deployment, 25% say they have done so to a degree, while 30% say they are in the process of cloud deployment.
- **When asked about mobile use for information access, business applications, and process interactions, 39% of respondents see themselves as Trailblazers in their personal lives and 31% in their business lives.** Regarding businesses, 31% see their businesses as Outlanders company-wide and 24% at the departmental level.
- **When it comes to mobile device capabilities, 21% say they are Trailblazers in process approvals on mobile.** Looking at digital signing on mobile devices, 52% see themselves as Outlanders.

Process

- **When considering use of automated recognition and routing, 43% of respondents position themselves as Outlanders.** Twenty-two percent see themselves as Trailblazers in capturing data closer to the customer with 23% saying they are ahead of the pack – Trailblazers - regarding paper-free process.
- **Focusing on multi-point capture and workflow, 19% consider themselves as Trailblazers in this area.** When it comes to mobile capture, 34% see themselves as Outlanders.
- **Not everyone is dependent upon information management systems according to a mere 27% who say 100% of their office/knowledge workers are.** Collaboration tool dependence is the case for 16%, while 12% rely heavily on workflow systems.
- **Serious disruption in business would occur within 15 minutes if a major outage were to happen with their content application according to 12% of respondents.** Expanding this to a one-hour period, this number increases to 33% of respondents.

Social, Cloud, and Analytics

- **When looking at cloud use in an organization, 68% of respondents are personally using cloud for business.** Interestingly, 38% indicate there is no cloud across the enterprise and 33% say no cloud departmentally.
- **Turning our attention to cloud deployment within an organization, 21% say they are still experimenting with various options.** 17% say they are using a hybrid approach between small cloud (12%) and large cloud (5%) deployments.
- **Regarding hosting or deployment methods, 21% indicate preferences to private cloud hosted within their data center.** Fifteen percent say they prefer an outsourced private cloud with 13% indicating a multi-tenant public cloud preference if provided by their current ECM provider.

Opinions and Spend

- **Forty-three percent agree that the term ECM no longer applies and is limiting.** Seventy-one percent say no information governance for cloud will replicate current file-share chaos and that email is still their biggest problem.
- **The human factor seems to remain the biggest challenge to project success followed by costs and budgets.** Only 20% plan to spend more in the next 12 months on external training.
- **Analytics seems to have the greatest focus over the next 12 months with an indicated increase of spending by 46% of respondents.** This is followed by cloud with 33% indicating spend increases and 29% showing planned spend increases for workflow and auto-classification tools.



DISCUSSING

Digital Transformation



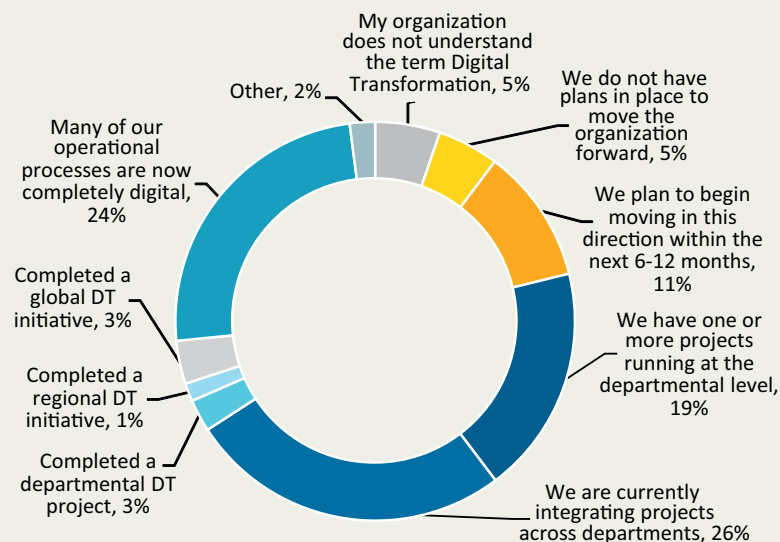
In General

When discussing digital transformation, it is best to expand one's view and horizon by looking at digital transformation as a journey rather than a project. Along the journey's path are mile markers to reach that serve to guide us toward our ultimate destination or goal in the transformation process. As the landscape changes due to business climate or imposed regulation, the path will take twists and turns toward the destination.

For many of our respondents, the journey is underway with twenty-four percent of respondents reporting that many of their operational processes have been digitized. Twenty-six percent of our respondents indicate that they are in fact taking a more holistic approach to digital transformation, integrating their projects across departments, creating a more integrated information ecosystem and breaking down the information silos.

As with any transformative process, there is a subset of Outlanders who indicate they have not begun to take this journey for reasons of not understanding the term or concept of digital transformation (5%), or just simply do not have plans in place at this time to move their organizations toward digital transformation (5%) as shown in Figure 1.

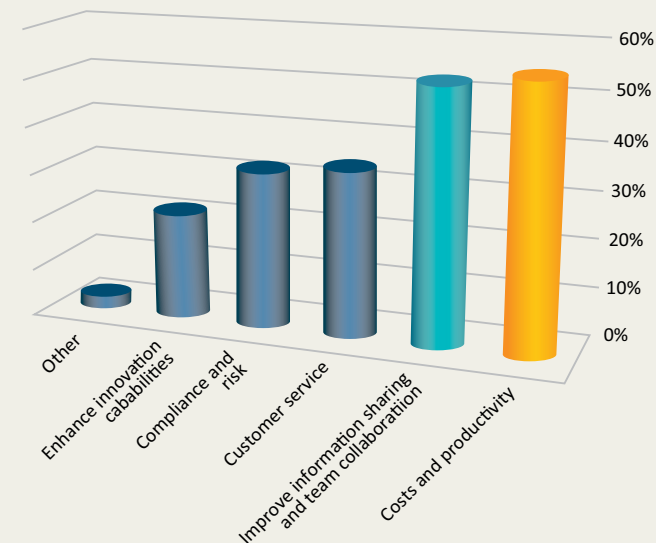
Figure 1: How would you best characterize your organization's journey in relation to Digital Transformation?



Turning attention toward what is driving digital transformation, we find that fifty-three percent of respondents are more forward thinking with a Trailblazer focus on improved information sharing and collaboration with an additional twenty-two percent citing enhanced innovation capabilities as one of their top two drivers. Fifty-five percent appear to have a more Citizen-like focus on the traditional costs and productivity aspect as a driver. (Figure 2)

This is not to say that cost and productivity are wrong, as they certainly are not and still hold true as being valid. What I am suggesting here is that even with these as the core driver, there should be some attention given to the road ahead and how the steps taken today support the overall journey and align with the target for the future.

Figure 2: When you consider Digital Transformation related projects, what is the most significant business driver for your organization?

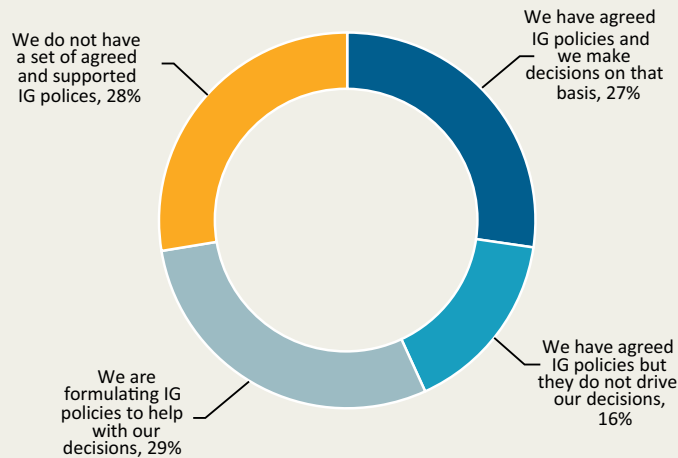


Looking at the impact of information governance in relation to decisions surrounding digital transformation, we find that twenty-seven percent make their decisions based on agreed upon IG policies. (Figure 3) When compared to a similar question in our 2016 Industry Watch report titled [“Information Management: State of the Industry 2016”](#), we find that only eighteen percent of respondents reported their ECM/IM decisions

DISCUSSING DIGITAL TRANSFORMATION

were based on agreed upon IG strategies, an indication that business organizations are accepting the role IG plays in developing and driving the overall IM strategy across the enterprise.

Figure 3: To what extent are your organization's Digital Transformation decisions driven by a set of agreed upon and supported Information Governance policies?

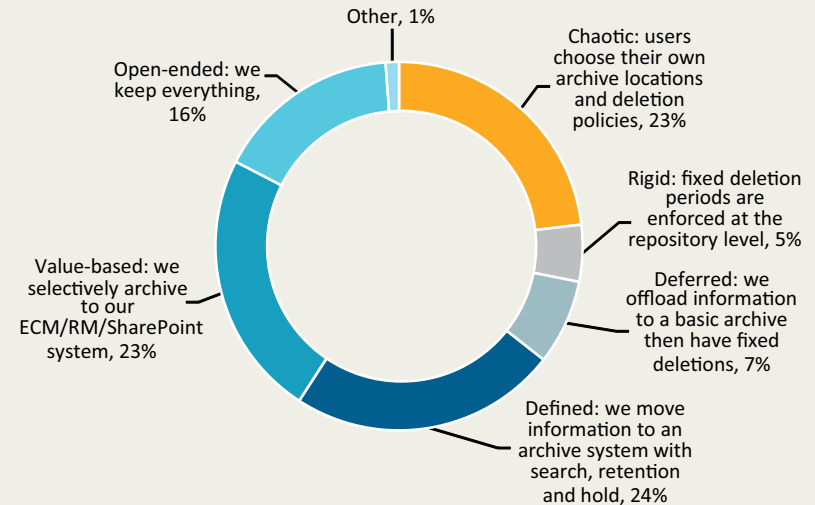


"Organizations are accepting the role IG plays in developing and driving the overall IM strategy across the enterprise."

So, while many organizations cringe at the term governance, there is growing acceptance as to its role and importance in relation to digital transformation, but what about applying it to more specific business areas? When we asked about the governance and management of multi-channel inbound information, twenty-four percent of respondents feel they have well defined inbound practices with twenty-three percent of respondents indicating they have a value based approach to selective archiving indicating some semblance of order in their practices. For twenty-three percent of respondents, multi-channel

inbound information is in a state of chaos where the user community is left to their own devices regarding the choice of archiving locations and deletion policies. (Figure 4)

Figure 4: How would you describe the governance and management of multi-channel inbound information in your organization?

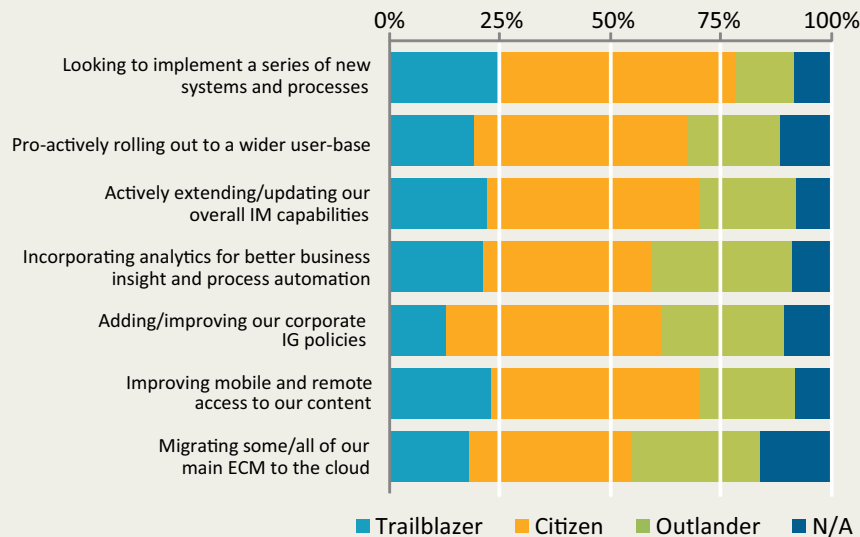


Knowing the drivers how decisions are made, and understanding the current state of governance and information management is one thing, but having focus on the journey is another. We asked our audience to describe how they see themselves with regard to their focus on digital transformation using the references we provided to position their organization as a Trailblazer, Citizen, or Outlander. While the majority across the board—not surprisingly—positioned their organizations as Citizens, twenty-five percent of respondents feel they are Trailblazers in implementing new systems and processes with twenty-three percent positioning as Trailblazers for improving mobile and remote access. When it comes to migration to the cloud, twenty-nine percent feel their organizations are Outlanders, falling behind the rest. (Figure 5)

DISCUSSING DIGITAL TRANSFORMATION

This is the question I have to ask: why is migration to cloud lagging for these Outlanders, and in today's world, why are more not taking lead positions in relation to implementing new systems and processes that support mobile and remote access?

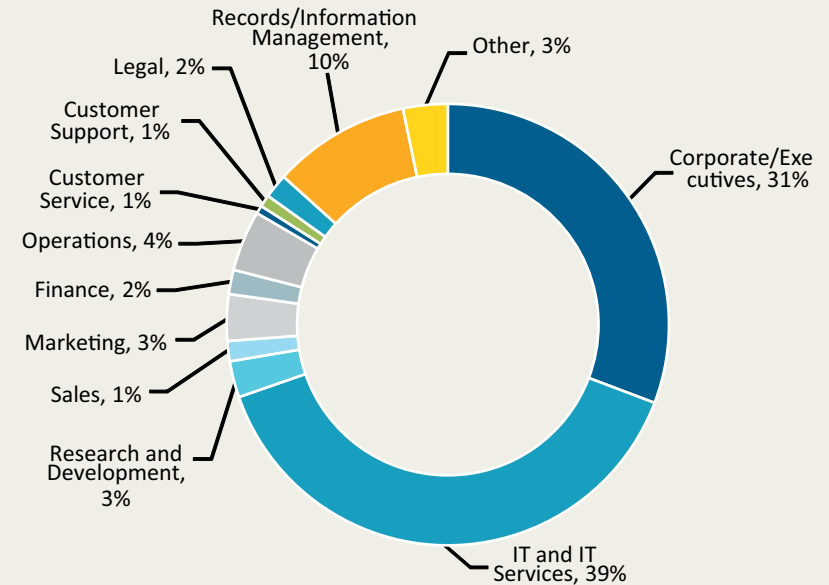
Figure 5: Which of the following describe your organization's biggest Digital Transformation focus?



We have identified the perceptions surrounding drivers, focus, and status of digital transformation within the enterprise, but who is the driving force within the business organization? Who is behind moving the organization along the journey's path to reach that desired destination and point where operations, information, and interactions have reached the complete digital state?

For thirty-nine percent of our respondents it is IT and IT services pushing for digital transformation, while for thirty-one percent, the corporate executives are driving it. Surprisingly, only ten percent indicate it is records and information management at the helm of their digital transformation journey. (Figure 6)

Figure 6: Which department is driving your organization's Digital Transformation projects?





INFORMATION MANAGEMENT

Practices



Putting The Pieces Together

There is definite indication of improvement and forward motion related to digital transformation as seen in the number of organizations completing the digital transformation of their operational processes and active integration of projects across departments, where once they would have been siloed.

There is still a substantial amount of chaos within these organizations regarding how multi-channel inbound information is governed and managed, indicating these organizations are likely in a more reactive mode than strategic outlook for the future. Organizations who lean toward being Trailblazers are taking a proactive position to eliminate chaotic environments by implementing new systems, processes and mobile/remote access capabilities.

Although nearly a third of respondents indicate they are still struggling with migrating information to the cloud as part of the overall transformation process—which could be due to a lack of confidence in cloud applications, or a vague understanding of how cloud can fit into the larger picture—there is great opportunity to extend and enhance the information ecosystem using cloud applications.

The fact that IT and IT services along with executive levels are driving these initiatives shows support from both the business and technology sides of an organization, which could also serve as the reason we see a split in the drivers for digital transformation between productivity and costs where business side executives tend to focus, and collaborative information sharing where technology tends to focus.

The digital transformation journey should be seen as a team effort of choosing the destination, planning the route to take, assessing the tools needed, and moving the organization along the path in a unified way. Executives, IT, Records/Information managers and a cross section of the user community should be involved to establish a unified vision, determine the goals (mile markers along the journey's path), and prepare to eliminate the barriers to completing the journey.

Information Management Practices

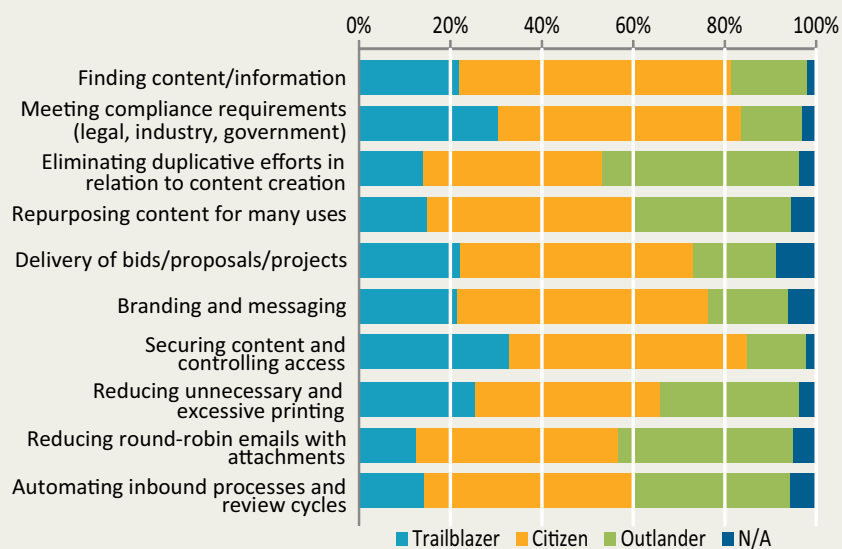
As mentioned previously, the digital transformation journey is made up of many elements. One of which is the way organizations manage their information—often called information management practices. I like the term practices as it infers a never ending quest for perfection. Think of it from the perspective of musicians or sports players who practice to sharpen their skills. This is also true of information professionals who use their skills, assess how effective they are, readjust how they implement or execute and begin the process over again.

The range of activities related to information management practices often includes the ability to not only search for but also find content, secure and control information/content and access to it, eliminating ROT (Redundant, Outdated, Trivial) information, and meeting compliance requirements.

When we asked our respondents about their experiences in these areas, we also asked them to choose their position as a Trailblazer, Citizen, or Outlander. Forty-three percent see themselves as Outlanders when it comes to eliminating content duplication, indicating there is a lot of redundancy in their organizations. When focusing on securing content and controlling access to it, thirty-three percent of our respondents feel they are Trailblazers as do thirty percent in relation to meeting their compliance requirements. (Figure 7)

So it stands to reason that stronger security and access control will support and strengthen an organization in meeting their compliance requirements – an area many organizations are beginning to realize is a much needed element in moving along the digital transformation journey.

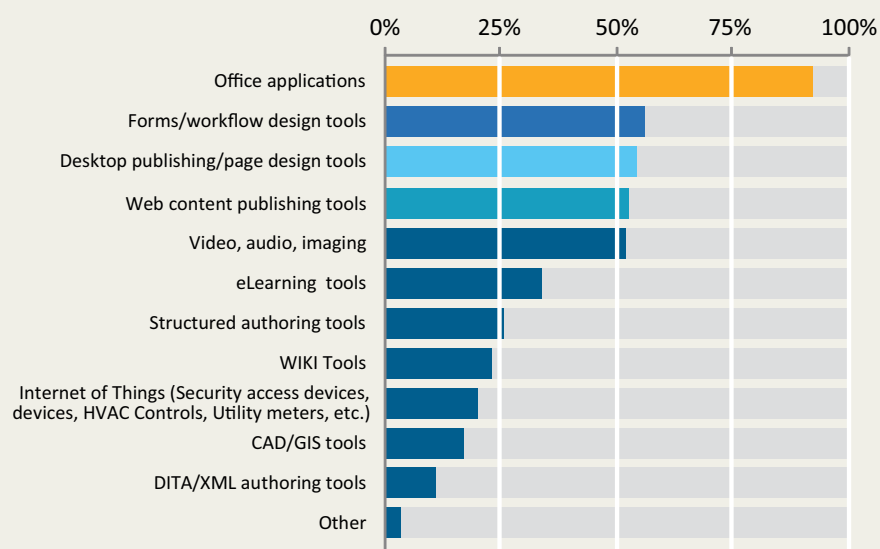
Figure 7: How would you describe your organization's experience in relation to the following business issues?



Having sound practices and having an understanding of your capabilities in those areas is a great beginning, but there also needs to be an assessment of the tools and technologies in use compared to what may be needed to successfully complete your journey. As such, we asked our respondents to share with us the tools they are using for the creation of content.

Not surprisingly, office applications top the list, but looking beyond that, fifty-six percent of our respondents indicate the use of forms and workflow design tools for content creation with fifty-four percent citing desktop publishing and page design tools, and additionally, fifty-three percent using web publishing tools. (Figure 8) So it appears that for many organizations, content creation goes well beyond the standard office tools suggesting that when you take inventory of your content assets, you should also consider how it is created, where it is created and who is creating it.

Figure 8: What tools do you currently use to create business content?



“Content creation goes well beyond the standard office tools suggesting that when you take inventory of your content assets, you should also consider how it is created, where it is created and who is creating it.”

We know that in today's fast paced world of business, content creation is often a collaborative effort involving several participants who serve to contribute, review, refine, and approve business related content. So as parts of the content creation practice, not only are the creation tools themselves important, so too are the tools used to collaborate among the participants across the enterprise.

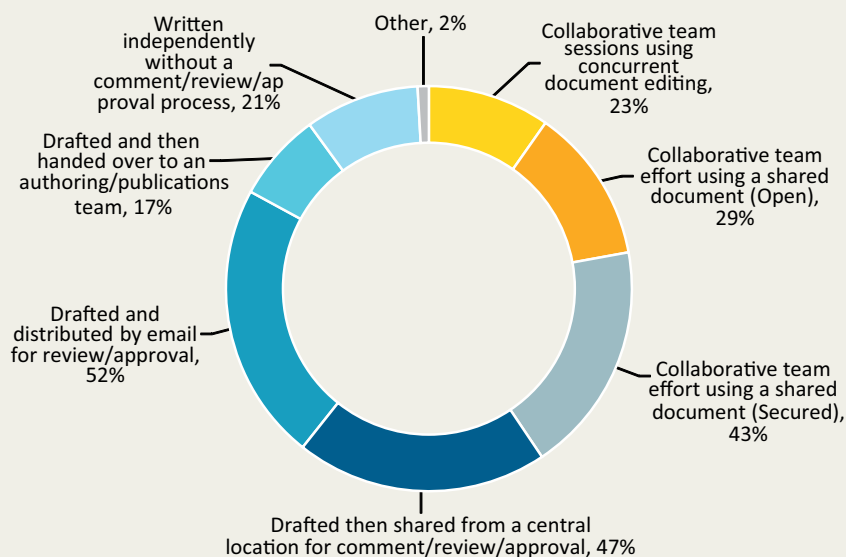
This turns our attention to some of the methods and practices organizations use to conduct these activities throughout the content lifecycle. When

INFORMATION MANAGEMENT PRACTICES

it comes to review and approval processes, fifty-two percent of our respondents indicate they draft the content then use email as the conduit between the participants. Forty-seven percent say they draft and share from a central location while forty-three percent indicate team collaboration using secure, shared documents. (Figure 9)

The fact that email is still so widely used is concerning on several fronts. There is risk of emails being shared with unauthorized personnel, growing numbers of copies—attachments—that not only cause administration issues but also increase vulnerability of non-compliance and costs in times of litigation and audit where all of this information must be found and presented. Trailblazers look forward to the concept of single source collaboration ideally in ways that are secure and controlled.

Figure 9: Which of the following methods does your organization/department mostly use for content creation?



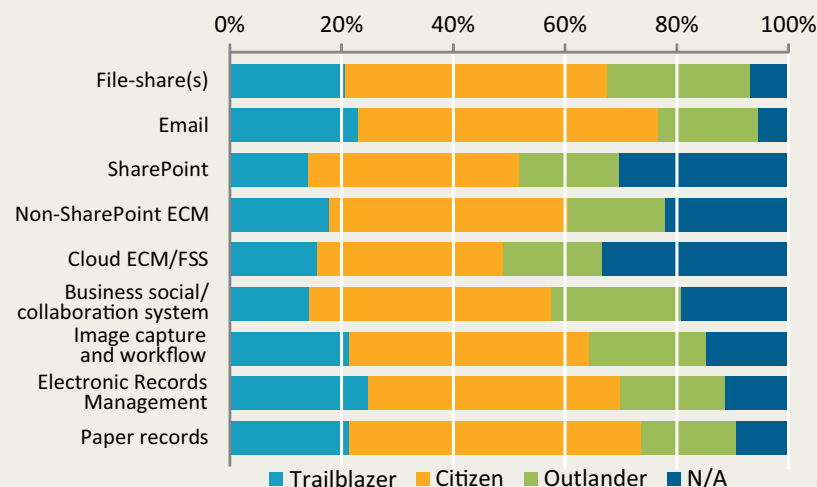
Information management practices must consider the entire lifecycle from creation to disposition and everything in between. We talked about the beginning, now let's talk about the end of the lifecycle and defensible disposition practices. In other words, if you were brought

into court and had to defend your disposition policies, could you, and would your practices stand up to the test? This is not only in reference to records where governance and guidelines are typically well defined but all information regardless of where it resides.

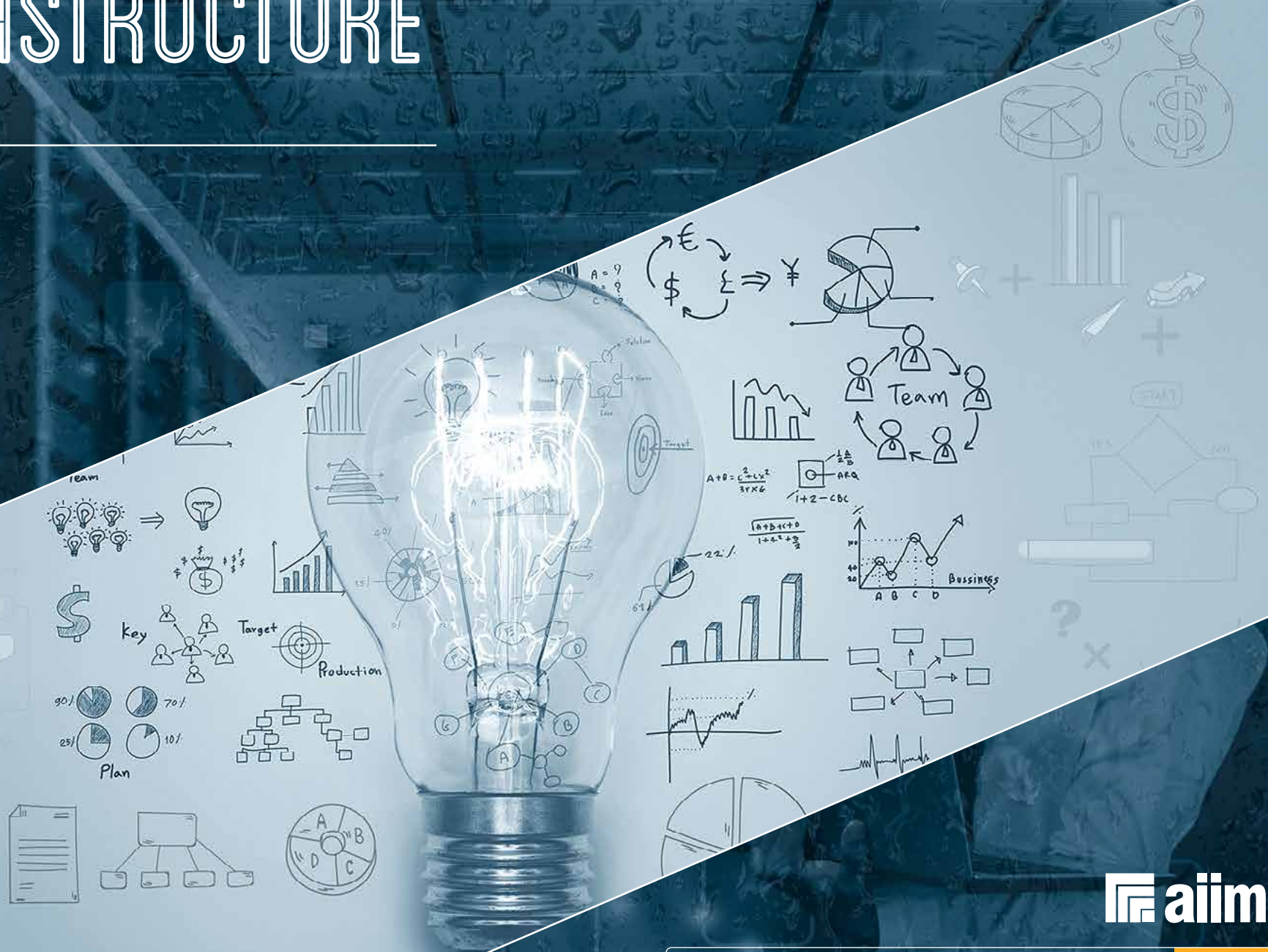
We asked our respondents to rate their organizations in defensible disposition across the enterprise and repositories including file-shares, ERM systems, email, and even paper. When looking at ERM twenty-five percent see their organizations as Trailblazers, while twenty-three percent rate themselves the same for email. (Figure 10)

Looking at file-shares, twenty-six percent indicate they are Outlanders and would have challenges defending their disposition practices in that area while twenty-one percent say they are Trailblazers. (Figure 10)

Figure 10: How do you perceive your organization's ability to defend in court, the deletion/disposition of information from the following?



INFRASTRUCTURE



Putting The Pieces Together

Information management practices are essential and should be considered part of the overall operations of a business organization. The same as planning a journey, there must be a plan and procedural guidelines related to information throughout the lifecycle—from creation to disposition. Many organizations miss the mark or fall short by placing this at a lower level than technology, or not on an equal level as records, since non-records are often considered works in progress and not a risk factor.

Information of every sort, regardless of what it is, takes time, resources, and effort to manage properly. When there are multiple copies of information—note I did not say versions because that would imply some sort of control—it is difficult to know which is the most accurate. In times of litigation and discovery when every piece of information must be located, identified, and presented, the costs could be substantial, especially if every user inbox, every USB and mobile device, and in some cases personal devices when they are used for business as well as privately, must be found, searched and documented.

Trailblazers understand the importance and benefits of standardized practices. They implement secure, single source collaboration environments where creation, management, and archiving or disposition can take place in a controlled way without impeding innovation.



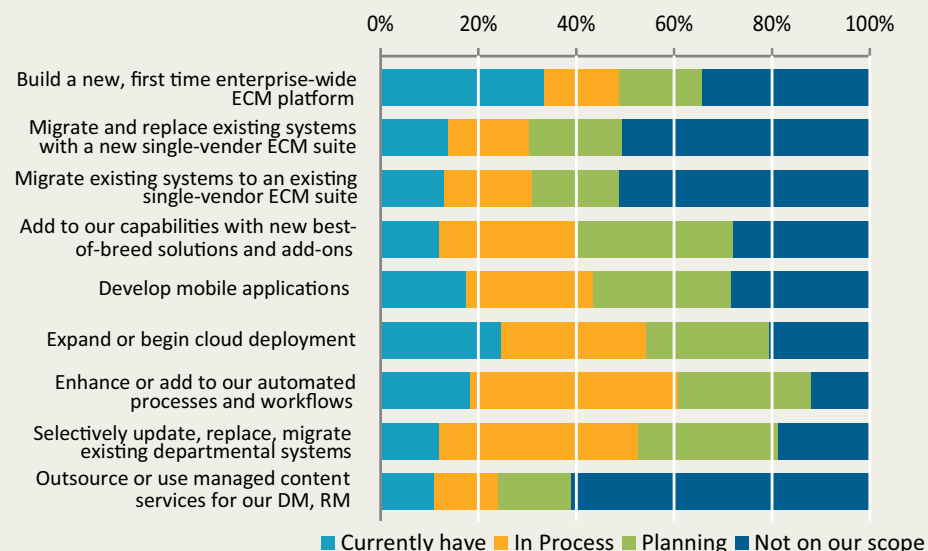
Infrastructure

In order for our digital transformation journey to proceed, there must be some sort of infrastructure in place to help us keep on track and reach our destination—this is our information ecosystem. It can be made up of on-premise systems, cloud applications, and extends our reach through mobile device use.

When we asked about current and planned infrastructure looking out over a two-year period, fifty-five percent of respondents indicate they have (25%) or are in the process (30%) of beginning or expanding their cloud deployments. Sixty percent have (18%) or are in the process (42%) of enhancing their automated processes and workflows. Surprisingly, in this day of consumable and online applications and outsourced services, sixty-one percent of respondents say it is not even on their scope to outsource managed content services for any of their DM or RM functions. (Figure 11)

Also of note is that forty-eight percent of respondents say they currently have (33%) or are in the process (15%) of building a new, first time enterprise-wide ECM platform. This is where I see standardization taking hold in that many organizations see an enterprise-wide platform as the way to strengthen their infrastructure and unify their information ecosystem for better security and control.

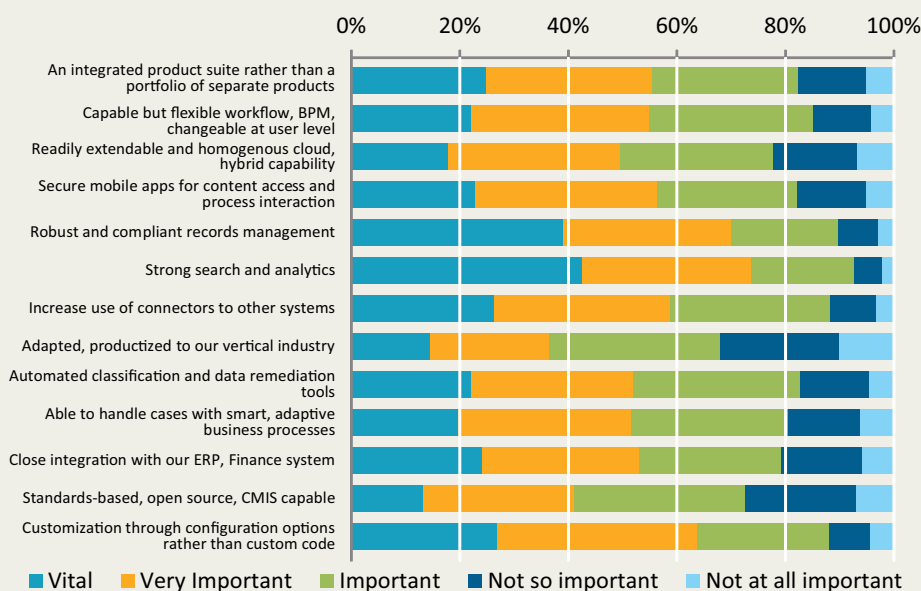
Figure 11: Is your organization currently, or planning to do any of the following in the next 2 years?



So what are the considerations for an ECM system? Perhaps a strong search capability, analytics, or even vertical alignment to address their industry or sector specific needs. When we asked about considerations and the level of importance placed on each, we found that search and analytics top the list for forty-three percent of our respondents followed by thirty-three percent who feel robust compliance and records management is key. While some may think that vertical adaptation may be high on the list—it certainly was in the early days of ECM—today we see that nearly one-third of respondents do not feel it is of importance. Of course the indication is that two-thirds may feel it is significant to some degree. (Figure 12)

Each organization will see things differently and the considerations they have will differ even between departments. Business requirements are really where this discussion should focus and the functional considerations should be driven from them.

Figure 12: If your organization were considering a new, replacement or consolidated ECM system, how important would each of the following aspects be?



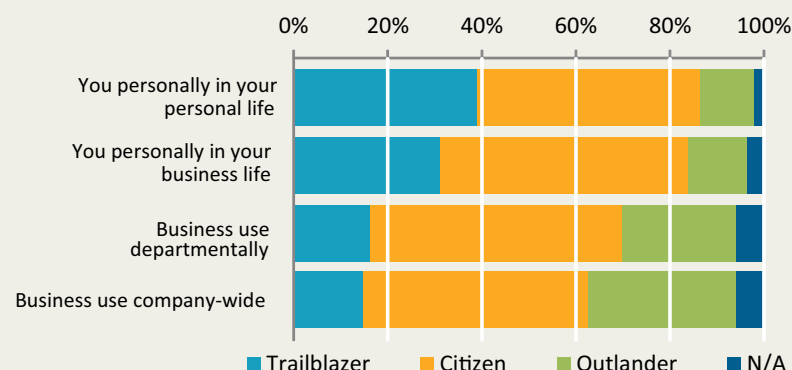
Infrastructure today must support growth of the information ecosystem and access to information and interactive processes from beyond corporate walls. This access could also extend beyond remote workers to suppliers, partners, and even clients. The most common method in support of this is mobile device use.

When we asked about mobile use, we asked for two perspectives. These are mobile use in personal and business lives by the individual, and use of mobile devices by the business at the departmental and enterprise level.

Thirty-nine percent of respondents see themselves as Trailblazers regarding mobile device use in their personal lives and thirty-one percent personally using mobile devices in their business lives. When it comes to organizational adoption of mobile devices, thirty-one percent see their businesses as an Outlander in an enterprise scale and twenty-four percent at the departmental level. (Figure 13)

Mobile use continues to grow on all levels and in every facet of our lives. Personally, we order food, transportation, and conduct bank transactions all through our mobile devices. In our business lives, we access email, and interact with colleagues to keep things moving, whether sanctioned or not, it happens. Business organizations are realizing it is here to stay and just like email, are still trying to figure out how to manage it properly.

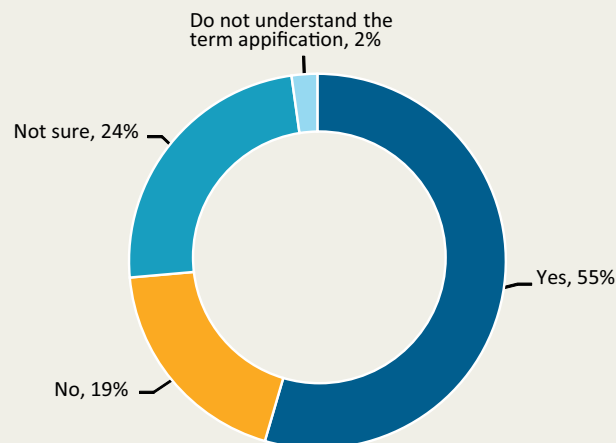
Figure 13: How would you describe the adoption of information access, business applications, and process interactions from mobile?



It only stands to reason that since mobile use is growing at such a rapid pace, business organizations that are forward thinking will seek new ways to maximize efficiency and effectiveness to gain a greater competitive edge, support innovation and collaboration, and lower costs. One consideration presented was the application of information technologies for use on mobile devices. In other words, using IM applications that are specifically designed to function on mobile devices using their operating systems and serving as the interface to business information and processes. No more desktop PC. No more laptops. No more clunky web interfaces that are not mobile friendly.

When we asked about considering appification, the use of mobile IM applications, fifty-five percent of our respondents indicated that yes, they are in fact considering this as an option. (Figure 14) This indicates that business organizations see the opportunity and realize there is benefit in adopting mobile use and are moving along that path in their digital transformation journey.

Figure 14: Is your organization considering the application of your information management technologies for use on mobile devices?

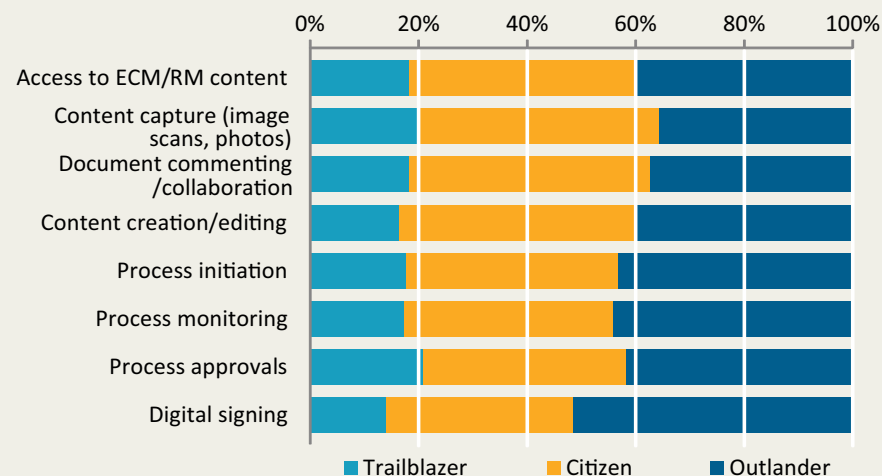


While it is encouraging to find appification on the radar of more than half of our respondents, we asked where they see their organization today in relation to mobile capabilities like process approvals, digital signing, and even process initiation and monitoring.

Twenty-one percent indicate they are Trailblazers when it comes to process approvals on mobile. More than half feel they are Outlanders when it comes to digital signing and more than forty percent when addressing process initiation and monitoring. (Figure 15)

There are many opportunities to leverage and benefit from mobile device use and this is seen by the more than fifty percent exploring appification of IM technologies. Perhaps the approach here is to identify the process, how it is initiated currently, where and when signatures are required—if they are required—and how mobile use can improve and enhance those processes. Additionally, consideration should be given to mobile monitoring or at least use of notifications when actions are required.

Figure 15: How would you describe your organization's capabilities in relation to the following on mobile devices?



"Identify the process, how it is initiated currently, where and when signatures are required—if they are required—and how mobile use can improve and enhance those processes."

Part of the infrastructure discussion these days inevitably turns to the use of tools like analytics to uncover hidden or "dark" data and gain valuable insight into business operations, enhance customer engagement, apply and refine metadata, and identify potential for information repurposing to reduce or eliminate duplication.

When we asked our respondents to position their organizations in relation to analytics use, seventeen percent see themselves as Trailblazers in using analytics to identify sensitive content and security risks. When we look at analytics to correct metadata and eliminate redundancy, forty-five percent say they are Outlanders while forty-two percent identify the same for auto-classification at the time of creation. (Figure 16)

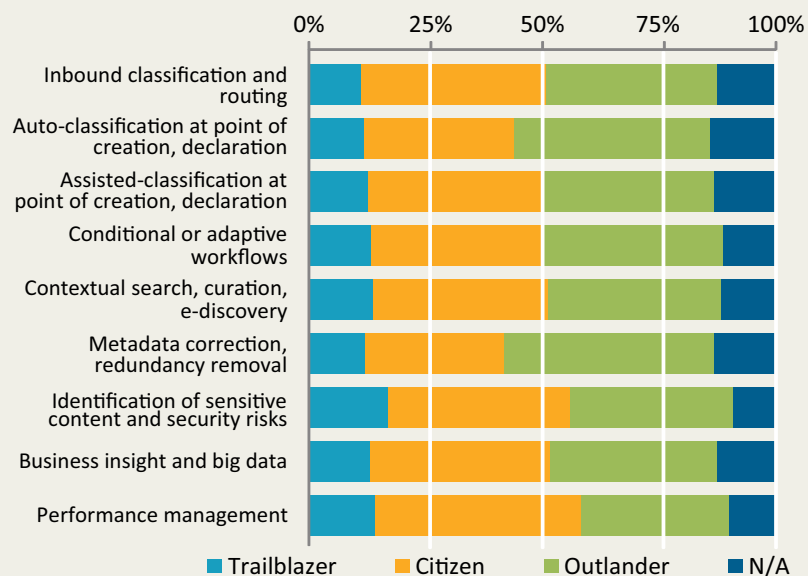
There is great opportunity to enhance content management capabilities by using analytics tools to identify content types, classify that content, and apply proper metadata in the earliest stage of the creation process. Additionally, this is an opportunity to ensure that information of a sensitive nature is managed appropriately and immediately to minimize possible security risks.



PROCESS



Figure 16: How would you describe your organization's use of analytics for the following?

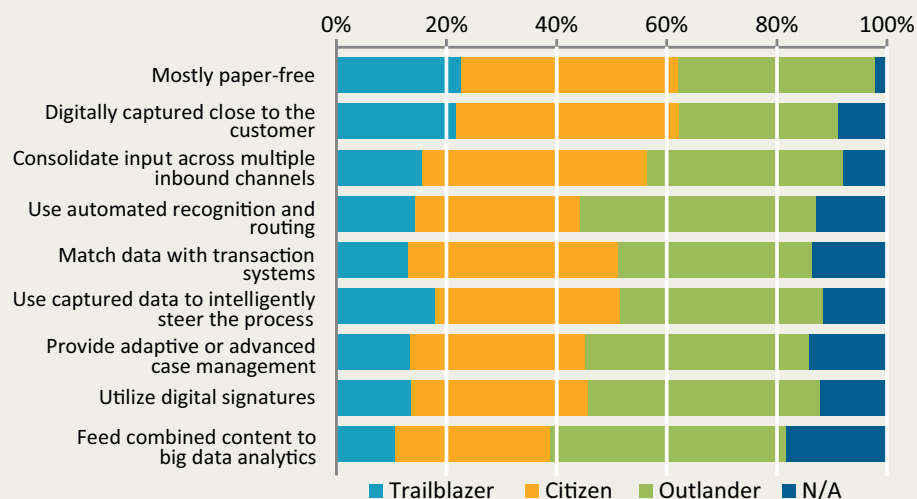


Process

This leads us to a discussion more specifically related to process. Process is a key element of any business; bringing all parties and information together, typically with a focused purpose like contract creation, review and approval, and even client engagement. It is no secret that paper tends to clog and slow business processes, so for decades, we have heard about businesses trying to be paper-free, and in many cases, this is the underlying reason for digital transformation.

When we asked our respondents about their processes, twenty-three percent feel they are Trailblazers and forty percent Citizens when it comes to being paper-free, with twenty-two percent positioning themselves as Trailblazers in relation to capturing data close to the customer. When it comes to automating the capture process, forty-three percent say they are Outlanders in the use of automated recognition and routing capabilities. Additionally, eighteen percent say they are Trailblazers in using data to steer their processes. (Figure 17) There seems to be an opportunity and disconnect in that use of automated recognition routing tools could further enhance operational efficiency and effectiveness for those Outlanders and perhaps serve as their starting point on that part of their digital transformation journey.

Figure 17: How do you position your organization's business processes in relation to the following?



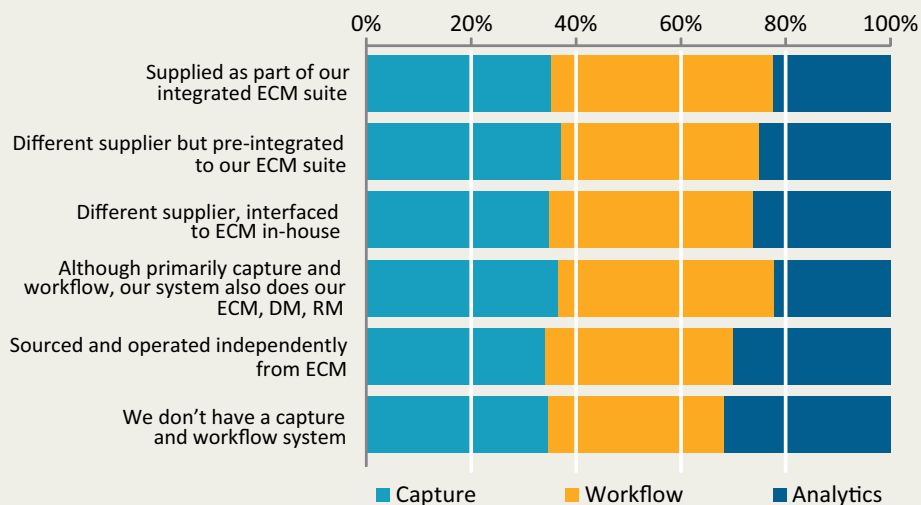
Putting The Pieces Together

Digital transformation requires a strong infrastructure designed to support the needs of today and future growth and expansion of the information ecosystem as a whole. Automated processes, extension of information management beyond corporate walls to the cloud, and use of mobile devices deliver flexibility to the user community and business operations as a whole. But this is not enough.

Consideration must be given to the information and its use as a whole. Where information is created, by whom, how it is used, where it is used, and potentially where it could be used are vital to operational improvement and responsiveness. Trailblazers take a proactive position by using analytics as a tool to help them answer these questions and gain maximum benefit from their information assets in ways that improve value to their clients and improve with intent to automate their underlying business processes.

Curiosity sometimes takes over and as such we wanted to know where our respondents are turning to source their automation tools. For many, these capabilities are part of a larger, integrated suite with sixty-seven percent reporting workflow, fifty-six percent capture, and thirty-five percent of respondents indicating this to be true. Add-ons still play a major role in that forty-two percent cite their workflow, forty-one percent capture, and twenty-eight percent analytics products are seen as pre-integrated products to their existing systems, from third-party sources. (Figure 18) In either case, it is evident that business organizations are seeking additional functionality to meet their specific business and functional requirements.

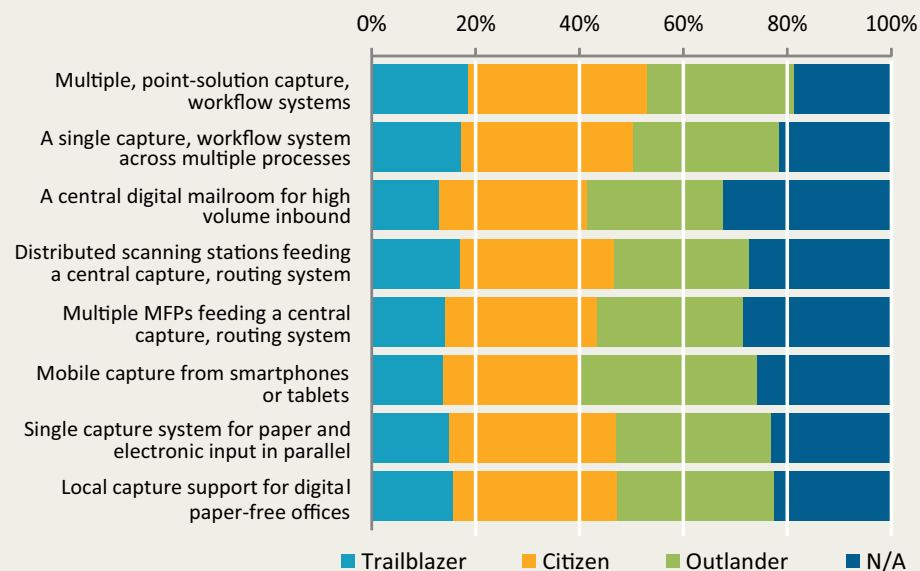
Figure 18: Which of the following best describes your current capabilities for capture, workflow, and analytics?



Given these capabilities are purchased, it does not inherently mean they are used—especially when purchased as part of a suite—nor does it mean they are used effectively. When we asked our respondents to rate their organizations regarding use of these capabilities, only nineteen percent see themselves as Trailblazers in the use of multi-point capture and workflow systems yet as we saw earlier sixty-seven percent report workflow and fifty-six percent capture as part of their integrated suite. Extending this to mobile capture, thirty-four percent indicate they are Outlanders in this regard. (Figure 19)

The fact an organization has the capabilities and is not fully using them raises a common challenge within the user community in that often times functionality is purchased only because it is part of a larger package like a suite and not particularly out of need. In many cases, there is a desire to purchase only what is needed for those who need it at that point in time.

Figure 19: How would you rate your organization's capture and workflow capabilities?

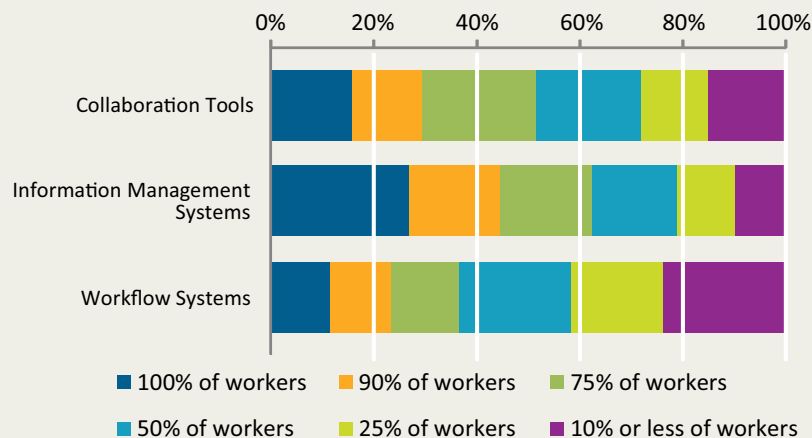


This brings me to question how dependent the workforce is within the business organization. When we talk about collaborative environments, use of information systems, and workflow systems to create information, conduct review and approval processes, and in general carry out their day to day activities to make work happen, what is the level of dependency by the office/knowledge worker?

According to twenty-seven percent of our respondents, one hundred percent of their office/knowledge workers are dependent upon their information management systems indicating that seventy-three percent are using other resources to get their information.

When looking at collaboration and workflow, sixteen percent say they depend on collaboration tools and twelve percent on workflow systems. (Figure 20)

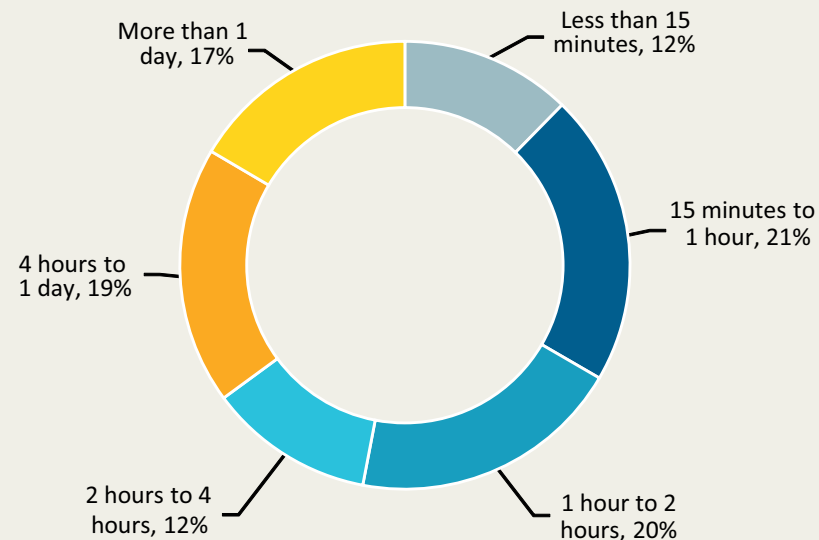
Figure 20: What proportions of the office/knowledge workers in your organization depend on your collaboration, IM, and workflow systems to do their everyday jobs?



Interestingly, when there is not a full 100% dependence, you would think that the impact of an outage might be small yet when we asked about the impact of an outage, thirty-three percent say it would be considered a serious disruption within an hour and within fifteen minutes for twelve percent. (Figure 21) While the overall percentage of a third remains close to what we found in our 2015 report, there is a slight increase in the number citing that it is deemed serious within fifteen minutes.

So even though we see that a small percentage is 100% dependent, we also see the impact is significant should the underlying systems become unavailable. Trailblazers know that in order to successfully complete their digital transformation journey, the infrastructure and related processes must be available at all times, from all locations by all that require access to them.

Figure 21: How long before a system outage or major slowdown of your most critical content application would cause serious business disruption?



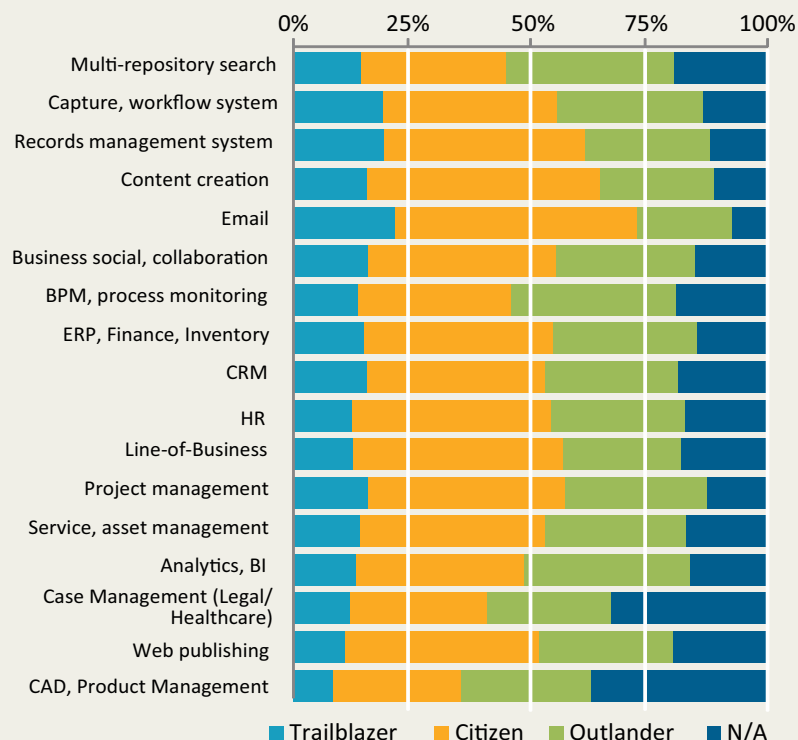
Automated processes, mobile devices, workflows, and information management systems make up the information ecosystem, but how much of it is really connected? In an ideal situation digital transformation would link all information resources, processes, and even people to each other. This level of integration is often the goal and for nineteen percent of our respondents, they see themselves as Trailblazers when it comes to integration in capture, workflow and records management while twenty-two percent see themselves as the same with regard to email. When it comes to search across multiple repositories, more than a third have opportunity to improve as they see themselves as Outlanders in this area. (Figure 22)

Trailblazers see opportunity to improve efficiency by implementing multi-repository search, and additional opportunity to also increase findability through better identification and metadata use.

SOCIAL, CLOUD, and Analytics



Figure 22: How would you describe the level of integration between your ECM/DM/ RM/BPM systems with the following enterprise applications?



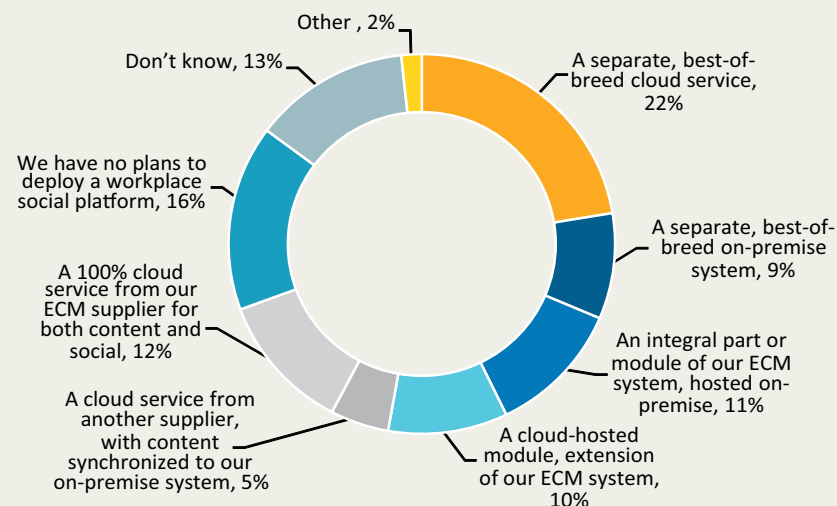
Social, Cloud, and Analytics

As mentioned earlier, extending the information ecosystem beyond corporate walls is fast becoming a goal of many organizations. In order to do this, many are turning to what is commonly referred to as the workplace social platform. In short, the use of social media tools and cloud applications to update their environments and extend their capabilities using tools familiar to users from their personal experiences.

Of course there are public tools available that in some cases are used, but we asked about organizational preferences when sourcing these tools. ECM providers are one source cited by twelve percent of our respondents who say they will get 100% of their cloud capabilities from them. For twenty-two percent, it is a best-of-breed approach that is most attractive and for sixteen percent, who could be considered Outlanders in this area, there are no plans at all for workplace social platforms. (Figure 23)

Sadly this ties back to what we saw earlier in that email is still the dominant means of collaboration, despite the existence of other methods that can be put into place in ways that eliminate redundancy, inspire innovation, and simplify collaboration.

Figure 23: Going forward, what would be, or is likely to remain, your preferred source for your main internal, workplace social platform?



Putting The Pieces Together

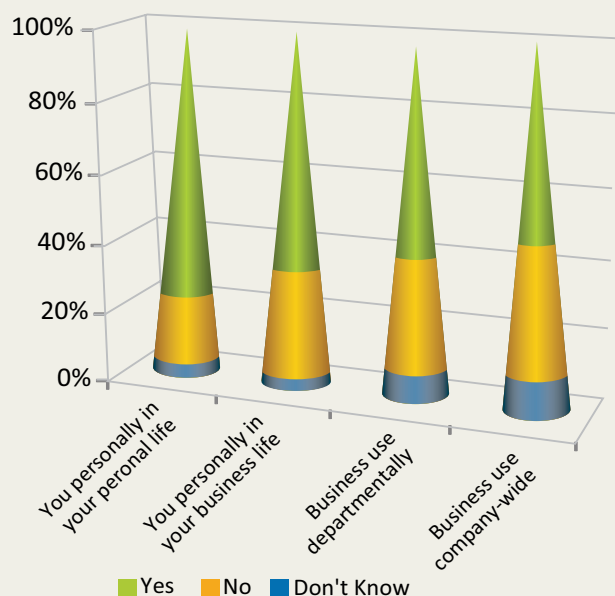
Information, process, and people are tightly related and must be viewed from a singular lens that presents the whole picture. When planning digital transformation and mapping the milestones, systems integration, process integration, and the human factor all weigh heavily on the desired outcome. The impact of one on the other can be significant in times of disruption and disconnect.

Trailblazers step back and take into consideration the impact they will have in changing the way business is transacted, how processes function, and the human interactions required in order to be successful. While it may not be a small task, it is one that must be taken else the full benefit will not be realized and the potential for less than expected results increases.

Whether or not business organizations want to accept it, the workforce is using social tools and embracing content in the cloud. So even if the Outlanders are not embracing it, their workforce is and they may not realize it. When we asked about personal and business use of content in the cloud, seventy-five percent of our respondents say they do this in their personal lives with sixty-eight percent citing they also personally use it for business. From an organizational view, thirty-eight percent indicate they are not embracing content in the cloud at the enterprise level and thirty-three percent say no at the departmental level. (Figure 24)

This indicates the need but also highlights a risk for the business in that they are not providing the tools their workforce feel are needed, and as such, the business is at risk of information residing outside of their information ecosystem and beyond their control.

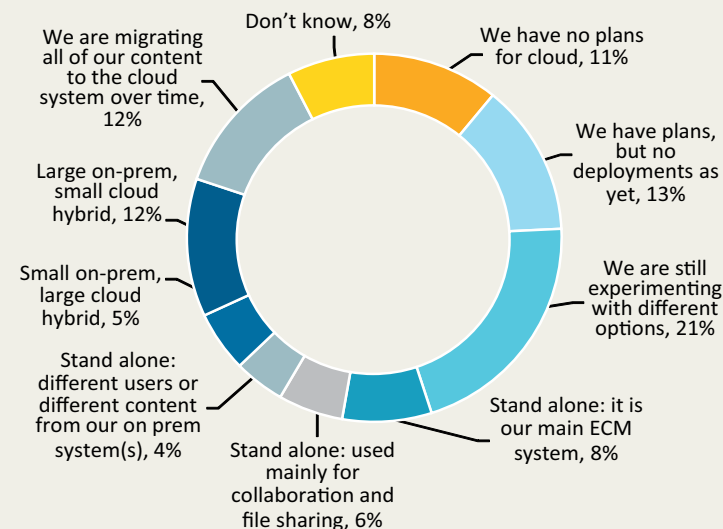
Figure 24. Are you and/or your organization embracing content-in-the-cloud?



Turning our attention to cloud deployment, we asked how cloud ECM and DM deployments have been implemented within organizations. A small number (12%) indicate they are moving everything over to the cloud while seventeen percent say they are implementing a hybrid approach of small cloud (12%) and large cloud (5%) deployments. (Figure 25)

So there is attention being given and in this study we also found that twenty-one percent are still experimenting with various options indicating uncertainty as to the role it can play, discomfort with some aspect—perhaps security—or a lack of knowledge related to what options are available to meet their needs.

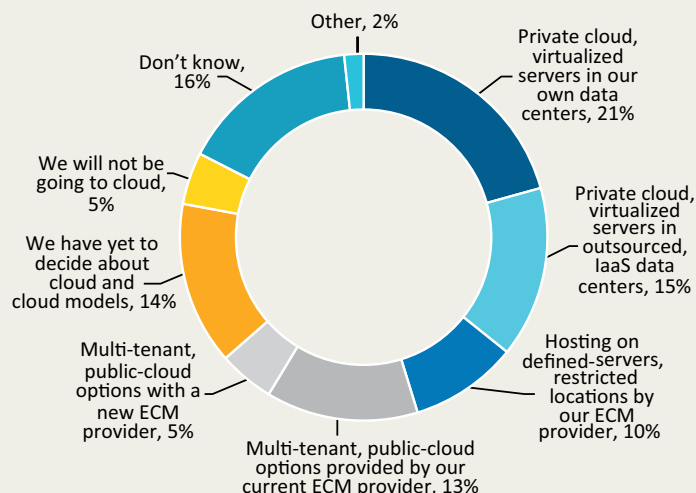
Figure 25: How would you describe current cloud ECM, DM deployments in your organization?



We have identified how deployment is done today, but is it the preferred method, or are their other preferences on the horizon? When we asked about cloud deployment preferences, twenty-one percent say they prefer a private cloud model hosted in their data center indicating a greater sense of control. For fifteen percent, private cloud is still a preference but they are comfortable with outsourcing it and for thirteen percent a multi-tenant public cloud hosted by their ECM provider is the preferred method. (Figure 26)

So it seems that private cloud in some form is still a dominant preference, whether internally hosted or outsourced, but within a closed environment. The fact that even this approach is being considered brings the organization closer to a Trailblazer level in that at least the mind-set is one of extending capabilities to meet workforce demands, while at the same time keeping control over the tools used. This is where cross-functional teaming in the development of the digital transformation journey is key.

Figure 26: What is, or is likely to be, the preferred model in your organization for hosting or cloud deployment of ECM?



“Trailblazers have a mind-set of extending capabilities to meet workforce demands, while at the same time keeping control over the tools used.”

Putting The Pieces Together

Today's workforce requires access to information and the ability to collaborate and interact with each other and the systems infrastructure on a 24/7 schedule. Trailblazers recognize and accept this new reality and work to move their organizations along the digital transformation path, setting these requirements as their mile markers.

Some organizations readily embrace that digital transformation is needed and that it is not a singular project but more of an on-going journey of constant transformation in order to meet the changing business landscape, comply with regulatory and legal requirements, and support their workforce in ways they never have. Today that means every option should be considered and evaluated. It also means that even though there are no official endorsements of tools like cloud and mobile, they are likely in use, albeit unofficially, and that places the organization at risk.

Opinions and Spend

With all of this in mind, we asked how people feel in general about current terms, supplier approaches, and even about their capacity to move forward. Regarding the term ECM, forty-three percent of our respondents feel that this term no longer applies or describes the full scope of products and services related to managing content. They recommend a new term be found to describe the holistic practice and tool sets now available. (Figure 27)

Additionally, seventy-one percent feel that email is still their big problem, even after all these years of pointing it out, describing the issues, and having technology available to help. The sense here is one of people remaining at the heart of the issue and a greater need for change management focused on re-educating the workforce on the impact email can have and the risks it represents. (Figure 27)

Third, when it comes to cloud, seventy-one percent say that without information governance in place, cloud will become just another chaotic mess like their file-shares and they will be no better off than they are now with the exception of accessibility to the chaos, yet sixty-four percent indicated that they have plenty of scope for extending or enhancing their capabilities.

(Figure 27) So it is not due to a lack of resources that things remain the way they are but perhaps a lack of motivation or incentive.

Figure 27: How do you feel about the following statements?

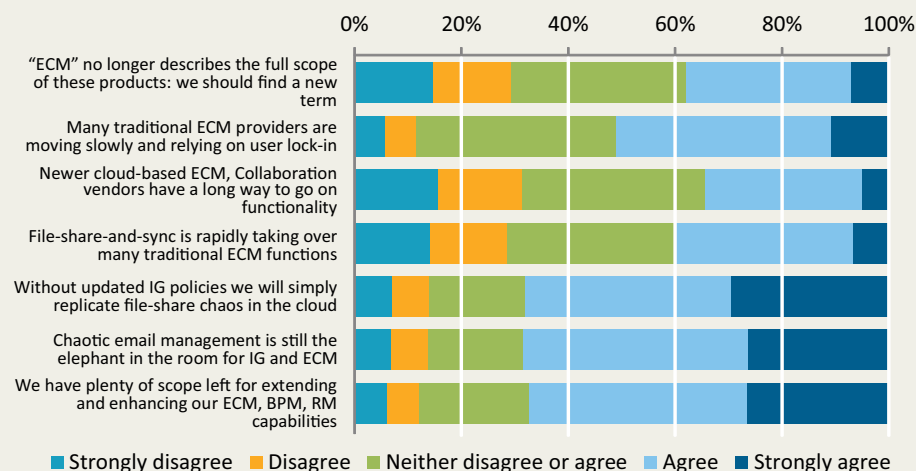


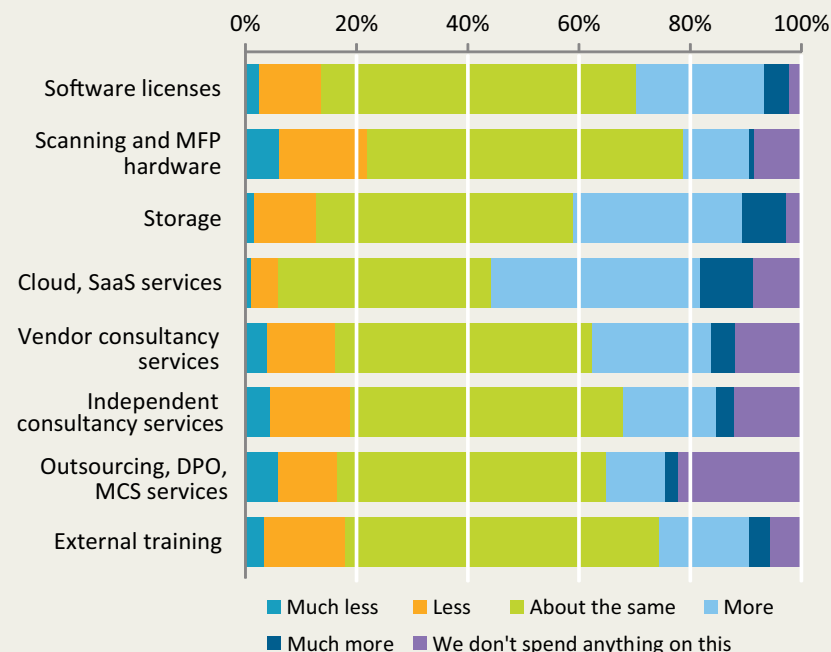
Figure 28: What would you say is your biggest hurdle to achieving 100% success with your current Digital Transformation program?



It stands to reason that if business organizations see the opportunity and agree there is reason to do so, they will find a way to get the needed funding for their digital transformation projects.

We asked our respondents to look back and look ahead, to share their perceptions of how spending will occur in the next twelve months compared to the past twelve. Nearly half indicate their organizations will spend more on cloud and Software as a Service options. Thirty-eight percent emphasize spending on storage while only twenty percent will focus on external training and education. (Figure 29) Given that the human factor and user adoption are the biggest hurdles, one might expect increased spending on education and training to eliminate that hurdle.

Figure 29: What are your spending plans for the following areas in the next 12 months compared to the last 12 months (ignoring inflation)?



Looking deeper into projected spending over the next twelve months, we asked about products and applications. Will spending increase for ECM and if so, in what form? We know search is high on the list of capabilities, what will be spent in that technology segment? Since analytics, cloud, and workflow seem to be hot topics, will there be an increase in any of these?

What we found is that forty-six percent of our respondents feel there will be an increase of spending for analytics, and thirty-three percent on cloud applications. Process and workflow rate fairly high on the increased spending plan along with auto-classification for twenty-nine percent of respondents equally, (Figure 30)



CONCLUSIONS

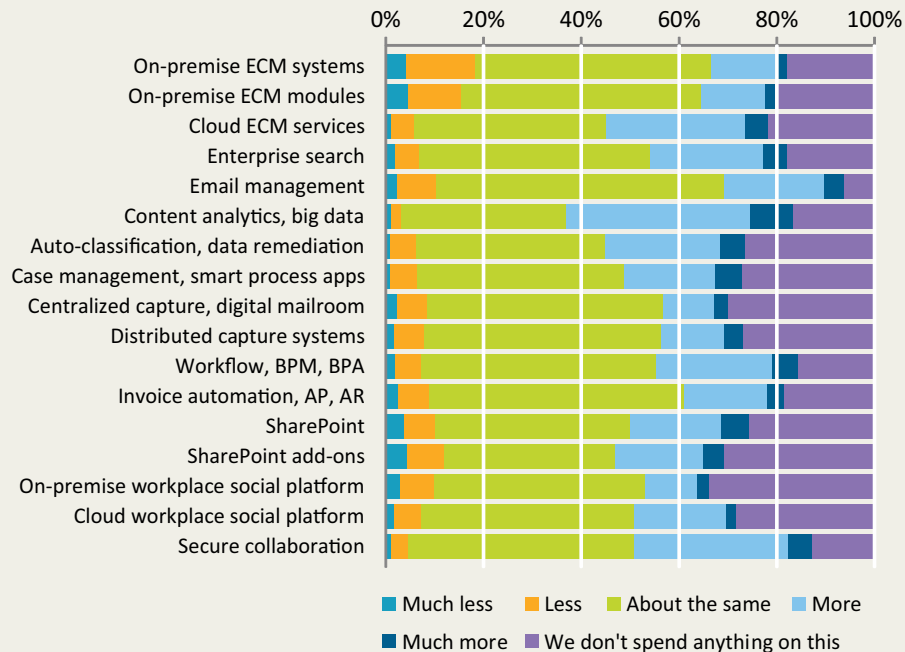
&

Recommendations



CONCLUSIONS & RECOMMENDATIONS

Figure 30: 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?



Conclusions & Recommendations

Digital transformation is a journey that must be planned. There should be a clear vision of the end goal or destination with mile markers put in place to guide the way. It is also imperative that business organizations take a holistic approach to digital transformation by not relying on technology alone for their success. People, process, business rules, and technology must be aligned to carry out the vision, support project goals, reach mile markers, and engage the workforce and user community to improve adoption rates.

While our research shows that IT and IT services along with executive levels are driving these initiatives there is a split in the drivers for digital transformation. This division occurs between productivity and costs, where business side executives tend to focus, and collaborative information sharing, where technology tends to focus. This re-enforces the need for involving cross-functional teams in the development of the digital transformation program, enabling IT and the executives to better understand operational issues, and uncover potential ways-of-working from the workforce that may have been and would remain hidden.

Trailblazers know or at least understand the close correlation between information, process, and people. They tend to view these through a singular lens that presents the whole picture and not just an abstract. For example, when dealing with change in the procurement department, Trailblazers look at how this change will impact process and participants across the end-to-end process rather than the immediate process segments to ensure positive results here, but also, to ensure this change does not cause negative disruption and disconnect upstream or downstream in the process.

In my view, there is great opportunity missed by many organizations to move their organizations along the digital transformation path. I know that not every organization or person can be a Trailblazer, and the fact that many are Citizens is a good thing, but when it comes to the Outlanders, it is time to get things in motion, else be left behind in market share, place your organization at higher risk of non-compliance and defensibility, and potentially become extinct.

Putting The Pieces Together

So there is indication that business organizations will be focusing on automation, business intelligence, and accessibility through the use of cloud over the next twelve months, taking them further along their digital transformation paths. So there is money to be found even though costs may be a barrier. It is available for the "right" things, whatever those may be and however the need and value are determined.

This does not account for user adoption, culture, and low management support however, and it remains to be seen how these will impact the projected spending and project success rates.

CONCLUSIONS & RECOMMENDATIONS

Our research proves that many organizations are on the path to digital transformation with a plan of sorts and perhaps even a focus. What is also evident is that issues raised decades ago, still remain as costly barriers that slow or prevent forward motion. There is no excuse for not addressing email, change management, or cloud and mobile use. The only one preventing these from being overcome is the organization itself, and a lack of support by organizational leaders.

If it is a matter of lacking expertise, hire or contract those who have it. If it is a lack of understating functional capabilities in the technology, research it and gain the knowledge you require to make an informed decision. If it is costs that make you nervous, work with the supplier community to identify those products and services that will meet your current needs and take them in a forward direction. The worst thing you can do is accepting things as they are and do nothing. This is the best way to go from being a Citizen to an Outlander rather than move up the ranks and closer to your goals.

I encourage you to consider these following recommendations and assess just how your organization can increase its digital transformation progress in a planned, calculated, and intelligent fashion.



Recommendations

- Identify a potential business process where paper-based information still exists and manual processes are still heavily in use.
- Document where the process slows down, what information is involved, the sources of that information, and who interacts with it.
- Identify who is in charge of operational process in that area, and seek support to digitally transform that process.
- Ensure that technologies including OCR, data capture, analytics and auto-classification are integrated with core enterprise systems. If not, make that a mile marker on the journey.
- Position information capture to occur as early in the process and as close to the first touch point as possible.
- Develop a strategy to leverage captured and analyzed information across multiple departments and for multiple purposes. Embrace the mind set of repurpose not recreate.
- Establish a continuous improvement program that will periodically review and refine those changes made now. When a project ends, it should be the beginning of an on-going process improvement practice that looks for ways to improve upon the foundation set and extend those capabilities to other departments within the organization.

If unsure of where to begin or how to begin, seek professional assistance and/or training to help determine the right path. Look to current suppliers and service providers for guidance. Turn to professional associations and peers to find advice and training that will provide best practices. It is better to take a step forward and learn, than to take no step and fall behind.



SURVEY DEMOGRAPHICS



APPENDIX 1: SURVEY DEMOGRAPHICS

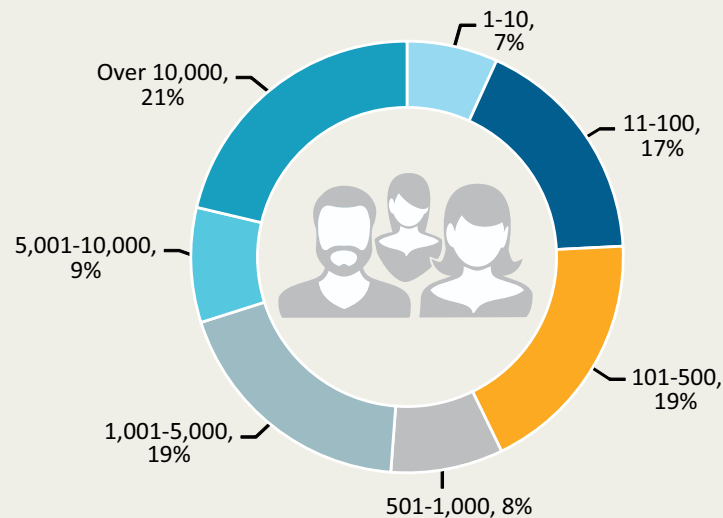
Survey Demographics

Survey Background

The survey was conducted with a web-based tool collecting responses from 686 individual members of the AIIM community during the month of January 2017. Invitations to take the survey were sent via e-mail to a selection of the 195,000+ AIIM community members and through various social media outlets.

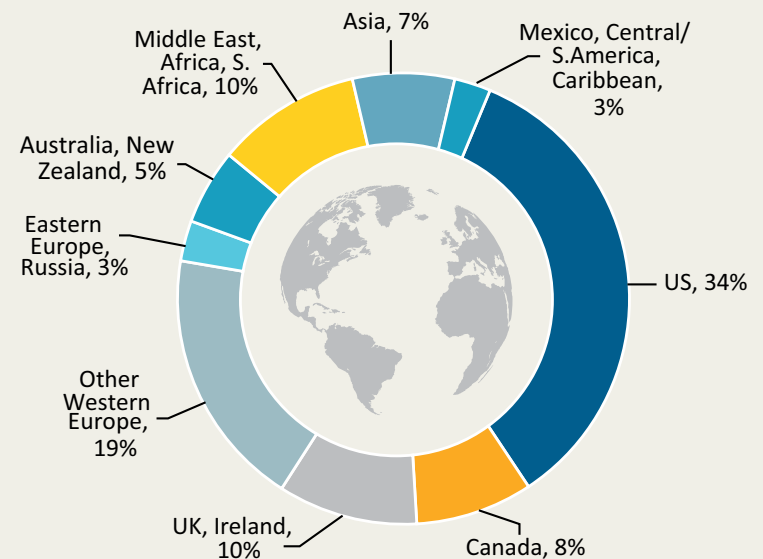
Organizational Size

AIIM survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 30%, with mid-sized organizations of 501 to 5,000 employees at 27%. Small-to-mid sized organizations with 1 to 500 employees representing the largest segment of survey takers at 43%.



Geography

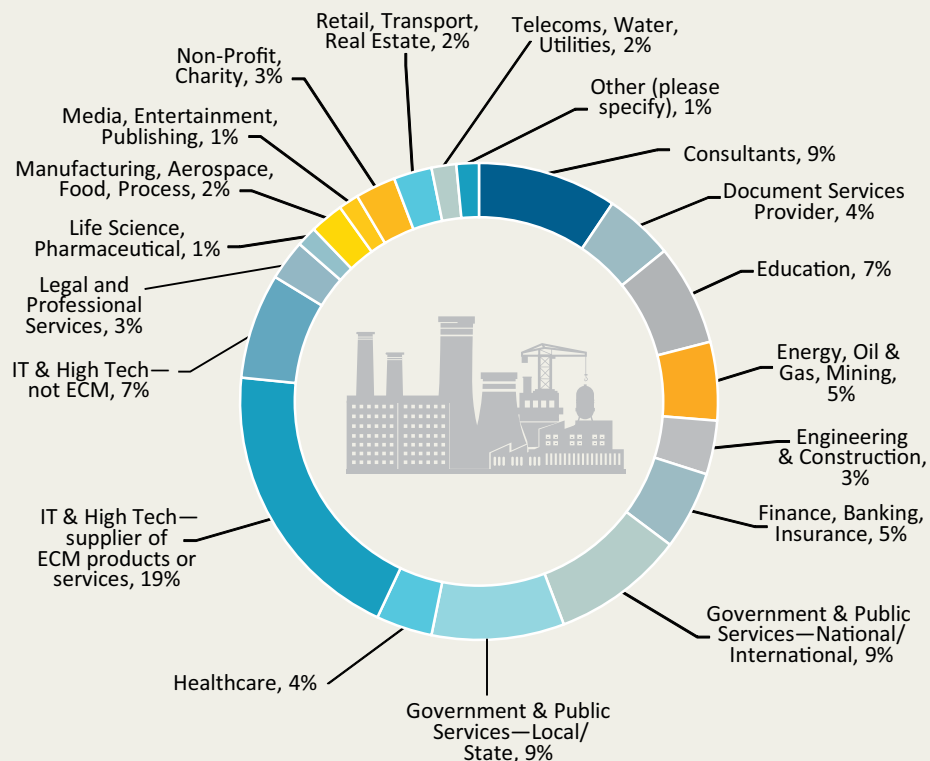
Forty-three percent of the participants are based in North America, with 42% from EMEA-R, and 15% rest-of-world.



APPENDIX 1: SURVEY DEMOGRAPHICS

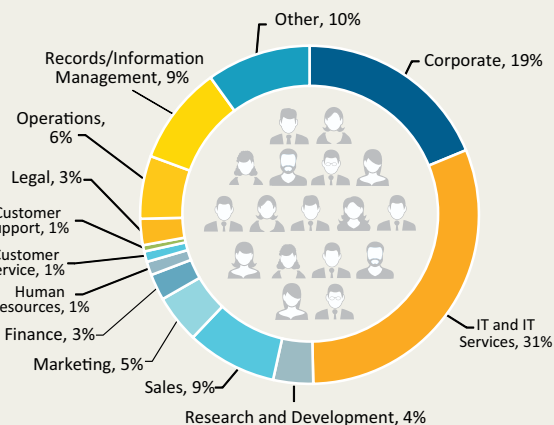
Industry Sector

Local and National Government together make up 18%, and Finance, Banking, and Insurance 5%, IT Education 7%.



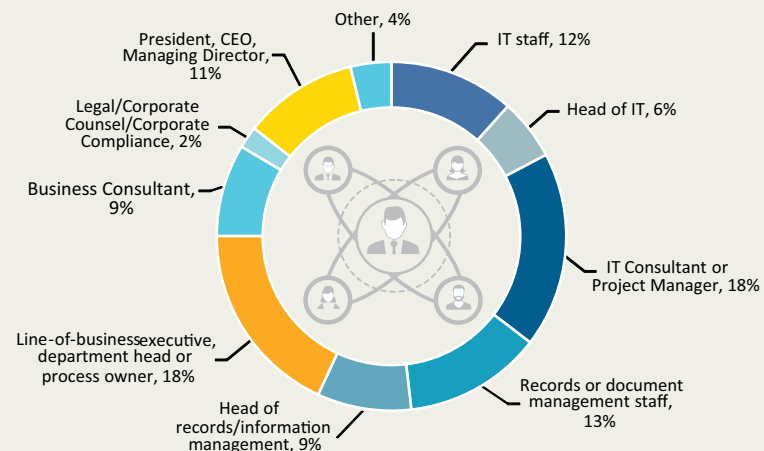
Departments

31% of departments represented are from IT/IT Services, 19% corporate, and 9% records and information management.



Job Roles

18% are IT Consultants/Project Managers, 9% heads of records and information management, 29% C-level Executives, Presidents, CEOs, and Line-of-Business Executives.



Open-ended Comments

Respondents were able to provide open-ended comments about digital transformation. Here are a select few that represent the general :

- There is too much noise out there. Someone needs to paint a clear picture of where things are going and why.
- It's really a balance of idealistic vs. realistic. Ideally we'd have more structured systems and information governance, but the reality is we will always have to work with a really diverse spectrum of systems, stakeholders, and tools.
- General principle: Any information, Any where, Any Device
- We don't need 'content in a box', we need a Content strategy with a human centric designed front-end capable to traverse information in different locations
- Future strategies for IM are not clear and the organization needs to take an enterprise approach rather than a siloed approach





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