Industry
Watch

The SharePoint Puzzle

- adding the missing pieces

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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 551 individual members of the AIIM community between May 30th, and June 25th, 2012. Invitations to take the survey were sent via e-mail to a selection of the 65,000 AIIM community members.

Survey demographics can be found in Appendix 1. Graphs throughout the report exclude responses from organizations with less than 10 employees, and suppliers of ECM products or services, taking the number of respondents to 488.

About AIIM

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

David Jones is a Market Analyst with the AIIM Market Intelligence Division. He has over 15 years' experience of working with users and vendors across a wide range of vertical markets. His experience has focused on taking complex technologies, such as business intelligence and document management, and developing them into commercial solutions largely in the retail, web and customer relationship management (CRM) areas. He has worked as a consultant providing document management, data mining and CRM strategy and implementation solutions to blue chip clients in the UK and Europe and produced a number of AIIM survey reports on issues and drivers for SharePoint, Cloud Computing and Social Business. David has a BSc in Computer Science, and is a qualified CIP, ECM[P] and SharePoint[P].

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Introduction

SharePoint has evolved from a somewhat lowly position to become the Swiss army knife of corporate IT departments, promising collaboration, team and project management, electronic content management (ECM), intranets and portals, records management, and more - straight out-of-the-box, and with over 70% of organizations having deployed SharePoint in some form, it appears to be here to stay.

However, whilst a Swiss army knife is useful because it has many different tools, none of those would normally be the tool of choice for a professional in any single area: opening a bottle of wine with the mini corkscrew might be fine once in a while, but a sommelier opening 30 bottles a day would use a piece of equipment built for much more frequent and rigorous use - stronger, easier to operate and more reliable.

So does SharePoint resemble the Swiss army knife? Good if you want to do a bit of collaboration here and there or a quick and easy intranet, but not quite robust enough for daily usage or enterprise-wide deployment? Or is SharePoint the rightful choice as the multi-disciplined IT tool for today's organization? Many would argue that the sheer volume of 3rd party add-ons highlight that SharePoint is nothing more than a Swiss army knife: a platform that requires users to plug-in "industry-strength" tools from external suppliers in order to achieve the performance, functionality and robustness required.

In this report we explore these questions, collectively described as "the SharePoint puzzle". We look at why organizations selected SharePoint in the first place, how it has performed against expectations, which parts of SharePoint businesses are using for ECM, collaboration, social, and business process management (BPM), and where gaps have been identified. We explore how organizations are adding these missing pieces with SharePoint add-ons, 3rd party extensions and cloud services. Finally we look at spend predictions for SharePoint-related software and services in the coming 12 months.

Key Findings

Adoption & Ownership

- **28% of respondents have SharePoint in use across their whole workforce.** 70% have at least half of their staff using it once a week or more.
- **Internal collaboration, file-share replacement and web portal/intranet are the primary reasons that users initially implement SharePoint.** Live document management figures as a prime reason for only 19%, although 78% now use it in this way.
- **68% of SharePoint implementation decisions are made by the CIO/Head of IT, or an IT manager.** 8% are made by a business systems advisory board, and just 2% by Head of Records/Compliance.
- **44% are using some form of ECM/DM alongside SharePoint.** 70% are not using SharePoint as their primary, enterprise-wide ECM system.
- **55% of respondents feel that it was the right decision to choose SharePoint.** 9% consider it was a poor decision, and 22% feel they have only achieved a basic deployment compared to their original ambitions.
- **Difficulty of content migration and information governance capabilities are given as the biggest shortfalls in expectations.** In terms of functionality, records management, workflow, social tools and email integration are considered lacking in capability.

On-going Issues

- **"Lack of expertise to maximize its usefulness" is given as the biggest on-going business issue by 46%,** followed by a lack of strategic plans on what to use it for.
- **Governance of metadata and dealing with site proliferation are given as the biggest on-going technical issues, along with missing functionality.** SharePoint is also considered to be technically difficult and takes longer than expected to roll out.
- **Nearly half of respondents have reservations about repository scalability and archiving.** Over one third are concerned with SharePoint's ability to meet their standards and compliance requirements.

Third-party products

- Over half (54%) are using or planning to use 3rd party add-on products in order to enhance functionality. Only a third thinks they will stick with the vanilla product.
- Security and rights management, workflow design and management, and document approvals are the most popular add-ons in place. Followed by project management, advanced search and case management
- Mobile extensions, social feeds, automated document creation/rendition, and document sharing/white-boarding are set to be high growth. Followed by records management, classification governance, and digital signatures.
- Over half feel they would be 50% more productive with enhanced workflow, search, information reporting, and automated document creation tools. Scanning and capture, case management and social system add-ons would produce productivity improvements of 25% or more.

Deployment

- 18% are deploying some form of cloud-based SharePoint, but only 5% as Office 365.
- Spend is moving from SharePoint licenses to third-party add-ins, although both are set to rise. Integration with other repositories is set for the biggest growth in spend.

SharePoint Adoption and Other ECM Systems

SharePoint is rapidly becoming the multi-disciplined platform of choice for many organizations promising ECM, records management, collaboration, search and more, straight out of the box. Our survey shows that almost half of the respondents (43%) are using the current version of SharePoint, the 2010 release, including 14% as a first use. This is a doubling from 21% (6% first use) from the AIIM SharePoint Industry Watch in 2011[1].

In addition 20% are in the process of upgrading from 2007 to 2010. However, of note is the fact that over quarter are using outdated versions of SharePoint (2007 and 2003) with no intention of upgrading – these organizations are not only missing out on new functionality but are also operating on versions of the platform which are soon to be unsupported: Microsoft will cease to support SharePoint 2007 in October 2012.

A tiny 1% no longer make use of SharePoint.

Figure 1: How would you best describe the primary version of SharePoint that you have in production use? (N=484)
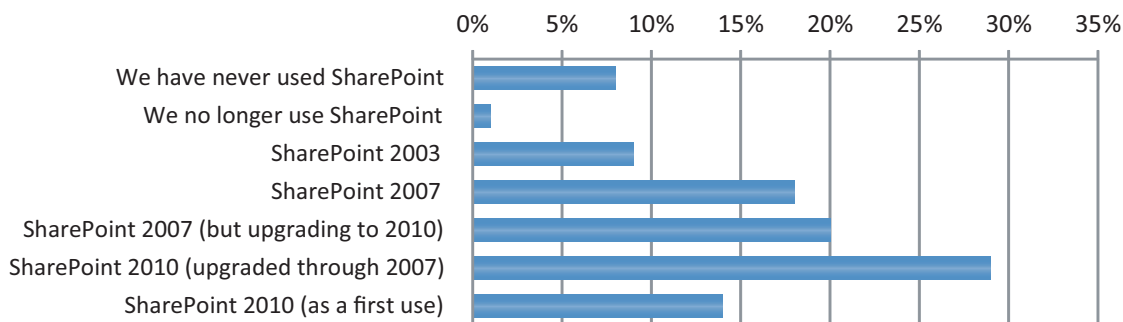
The 2011 SharePoint Industry Watch showed 85% planning to use the platform for some form document management (DM) and a healthy 78% have now achieved this and are using SharePoint in some DM/ECM capacity.

Many believe that SharePoint is all conquering in the ECM world and the figures above would suggest this is true. However, usage does not convert into exclusivity, with 70% NOT using SharePoint as their global primary ECM system – indeed only 14% use SharePoint as their only ECM tool. This suggests that organizations are using SharePoint for ECM as a single-point tool, perhaps on a site-by-site basis for project teams, as opposed to their corporate ECM repository.

The fact that SharePoint is not the primary repository does not necessarily discredit its usefulness as an ECM system: the federated search and connectivity functionality that SharePoint exposes, particularly when used in tandem with dedicated 3rd party add-ons, still make it a powerful portal to view data stored within other ECM systems.
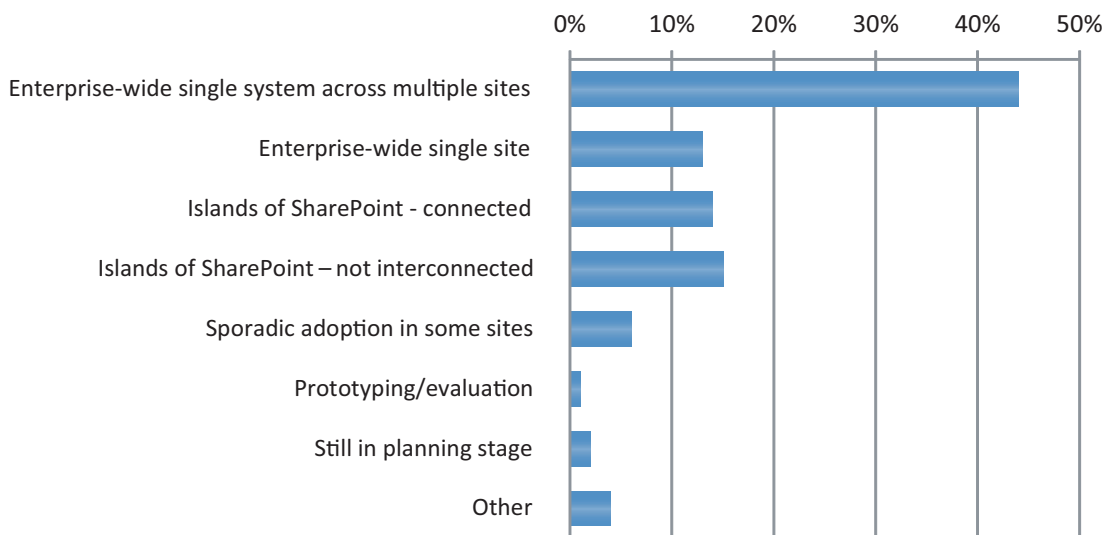
Figure 2: How would you describe your use of SharePoint as an ECM (Enterprise Content Management) system?
(N=435, excl. 53 "SP not in active use")

Category	Value
We use SharePoint for Collaboration and Social but not ECM	~34%
We only use SharePoint for web content management/ intranet/ portal	~21%
We have no plans to use SharePoint	~15%
We only use SharePoint for BPM and workflow	~4%
We previously used SharePoint for ECM but no longer do	~2%
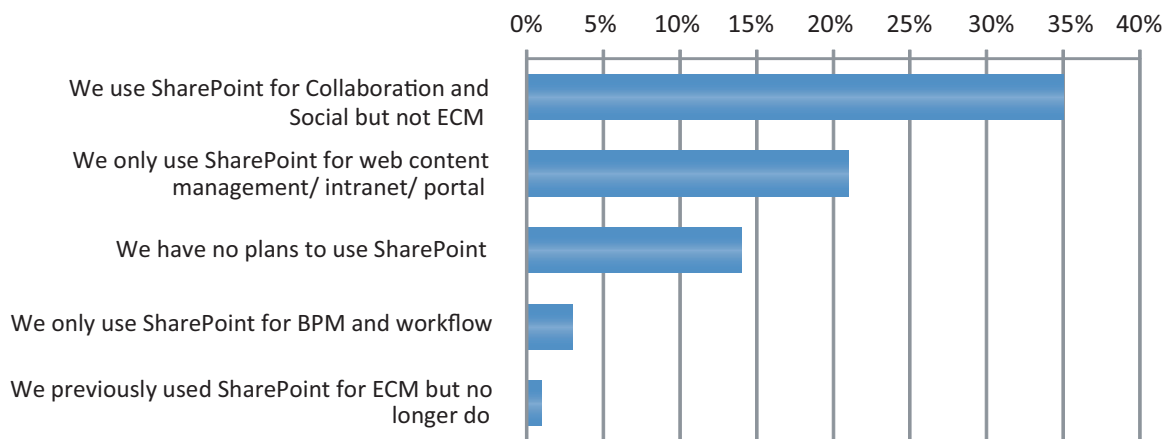
Almost half (44%) of those surveyed are using some form of ECM/DM tool alongside SharePoint.

The deployment of SharePoint across an organization can take many forms ranging from a single site, single system to multi-site, multi system and this is borne out by the spread of responses shown in figure 3. However, over half of the respondents (57%) are deploying a single SharePoint system across the full enterprise, with little variation across different company sizes. This firmly establishes SharePoint in the "highly integrated" category when compared to most enterprise systems.

Figure 3: How would you describe your deployment of SharePoint across the enterprise? *(N=326, All SP users)*

Category	Value
Enterprise-wide single system across multiple sites	~44%
Enterprise-wide single site	~13%
Islands of SharePoint - connected	~13%
Islands of SharePoint – not interconnected	~14%
Sporadic adoption in some sites	~6%
Prototyping/evaluation	~2%
Still in planning stage	~2%
Other	~4%

To counter suggestions that the practice of bundling Client Access Licenses (CALs) with Microsoft servers paints an over-enthusiastic picture of the per-desk rollout across the enterprise, we asked about "licensed and active" users. We found that over a quarter (28%) of businesses have achieved complete (100%) rollout with all users having access and using SharePoint at least once per week, and 70% have at least half at this level.

Patently not all are as enthusiastic, with around a third (30%) achieving usage rates of 25% or less.

Figure 4: What proportion of your office employees has licensed access to, and are currently active users of SharePoint, (at least once per week)? *(N=323, SP in use)*
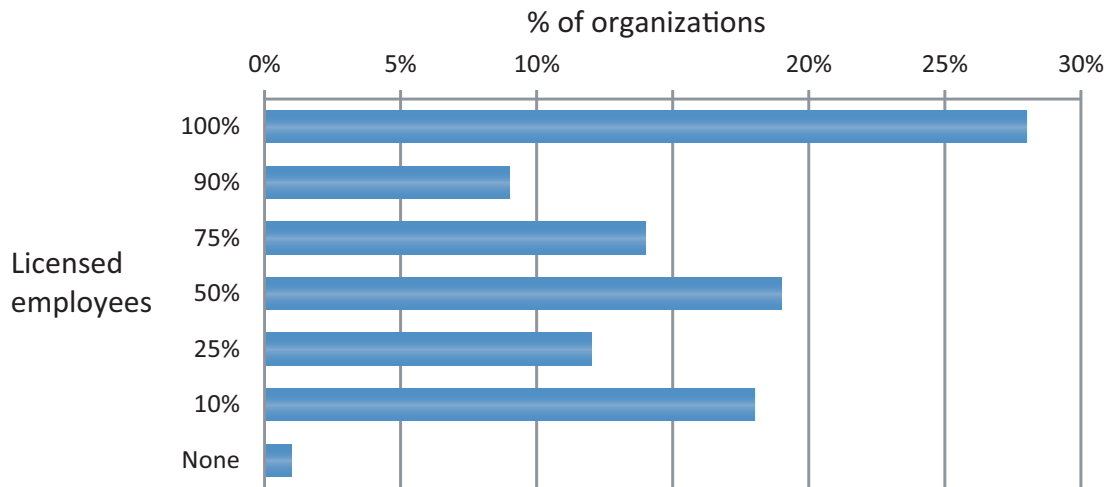
% of organizations

The initial roll-out of SharePoint into an organization is a technical project and it appears that the ongoing maintenance and management of the system remains with the IT department in the majority (66%) of cases. Project and functional divisions are in charge of around a fifth of SharePoint systems, highlighting the slow move away from IT ownership to business ownership. A key point to note is that compliance and records management most certainly do not assume responsibility, even in those organizations where SharePoint is the primary ECM system.

Figure 5: Who would you say is primarily in charge of your SharePoint system(s)? *(N=327, All SP users)*
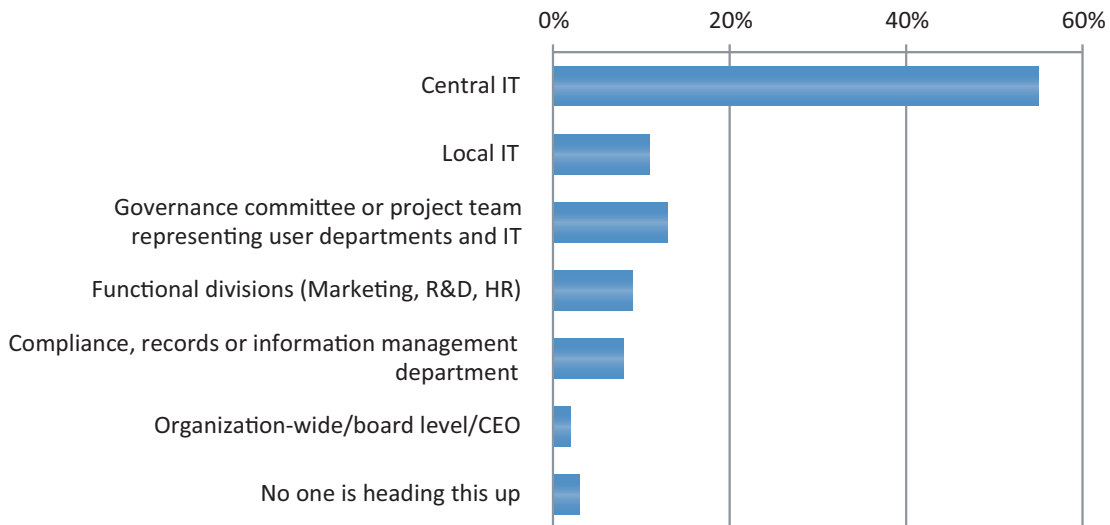
Original Drivers and Outcomes

Hindsight is deemed by many to be a wonderful thing, so in order to understand the impact SharePoint has within the business world we decided to look back at the reasons why the tool was selected, and how the reality compares to the expectation.

The collaborative aspects of SharePoint were the strongest original driver for exactly half of our respondents, rising to 57% for the largest organizations, with 38% for the smallest. Web portal/intranet (26%) and project management (13%) were also strong drivers but of more interest is the fact that SharePoint was more often selected to be a file-share replacement than a live document/content management system: this may well explain the usage of alternative ECM/DM solutions instead of, and alongside SharePoint as previously described.

Despite internal collaboration being cited by half as a key driver, external collaboration was not considered key, perhaps due to licensing challenges and costs related to extending SharePoint beyond the firewall, or concerns about the security of such connections and co-working.

Figure 6: What were your two main reasons for implementing SharePoint? (Max TWO) (N=315)
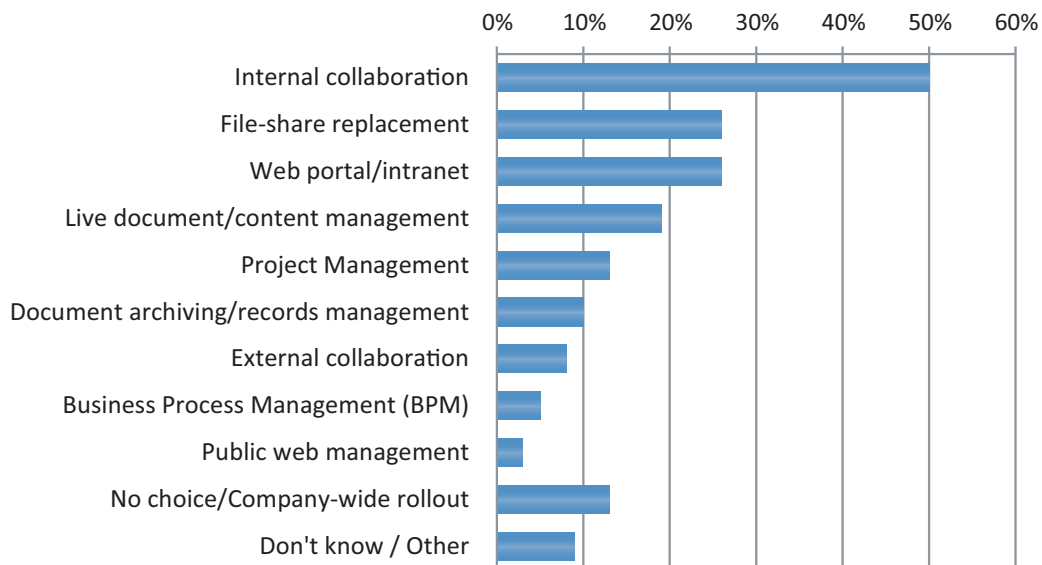
The decision to implement SharePoint has been made in over two thirds (68%) of organizations by IT: the CIO, Head of IT or IT Manager. This begs the question of how closely such an implementation was aligned to corporate planning and strategy given that an advisory board were only involved in 8% of the decisions: whilst IT are more than capable of technically implementing SharePoint, its integration into other processes and systems has an impact far beyond that of technology, and such decisions need to be made at board level with input from more than just the CIO.

**Figure 7: Who made the decision to implement SharePoint?** *(N=308)*
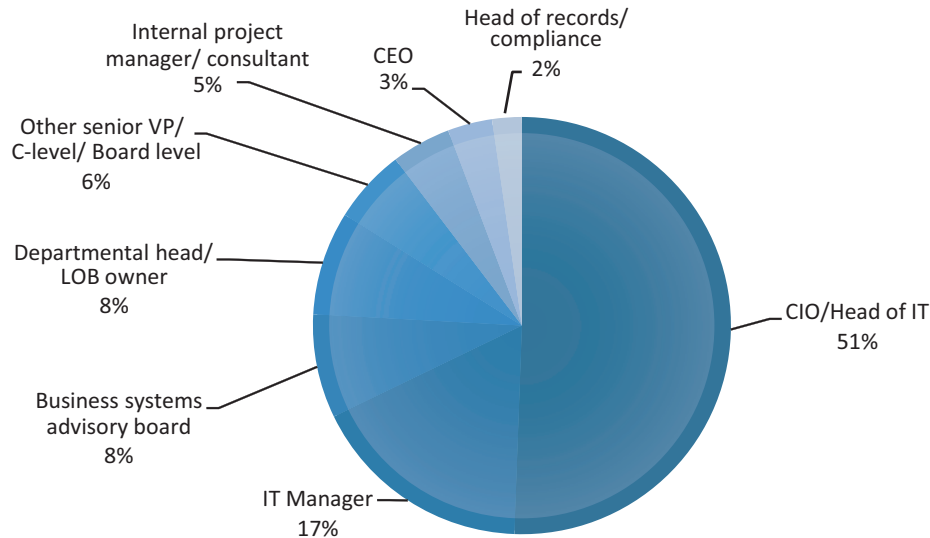
We asked how well the usability aspects of SharePoint compared with expectations. Unfortunately the majority of users were left largely wanting in most cases. "Amount of ongoing management" and "time to learn" are the only areas where "exceeded expectations" came close to outweighing the "below expectations" responses.

"Popularity with users" figured strongly both above and below the line, with users obviously either loving (17%) or hating (30%) SharePoint.

Those areas that did not meet expectations included ease of content migration (net 34%), information governance capabilities (net 26%) and time to implement (net 16%).

Figure 8: How do the various usability aspects of your SharePoint implementation compare with your expectations? *(N=295)*
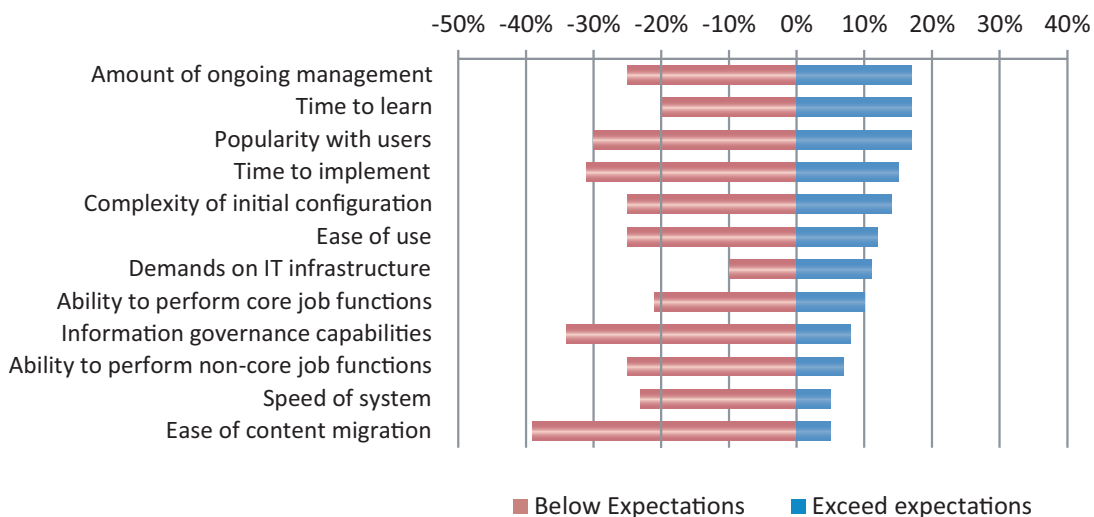
There are of course several ways in which to evaluate any system and SharePoint is no different. Whilst usability did not fare particularly well, the functionality of SharePoint compared with expectations is a mixed bag.

Certain aspects of SharePoint functionality such as internal collaboration (82%) and document/content management (72%) are at least meeting expectations, as are to a lesser degree messaging (53%) and external collaboration (44%).

However, there are functional areas where SharePoint does not meet expectations: records management, email management/integration and social tools all disappoint around a third of users. Records managers have long complained that SharePoint is not capable of properly managing records. However, new functionality in SharePoint 2010, namely the Records Center has been introduced to counter these arguments. It would appear that either it still does not deliver, users are unaware of it, or they are simply not using it.

Figure 9: How do the various functional aspects of your SharePoint implementation compare with your expectations?
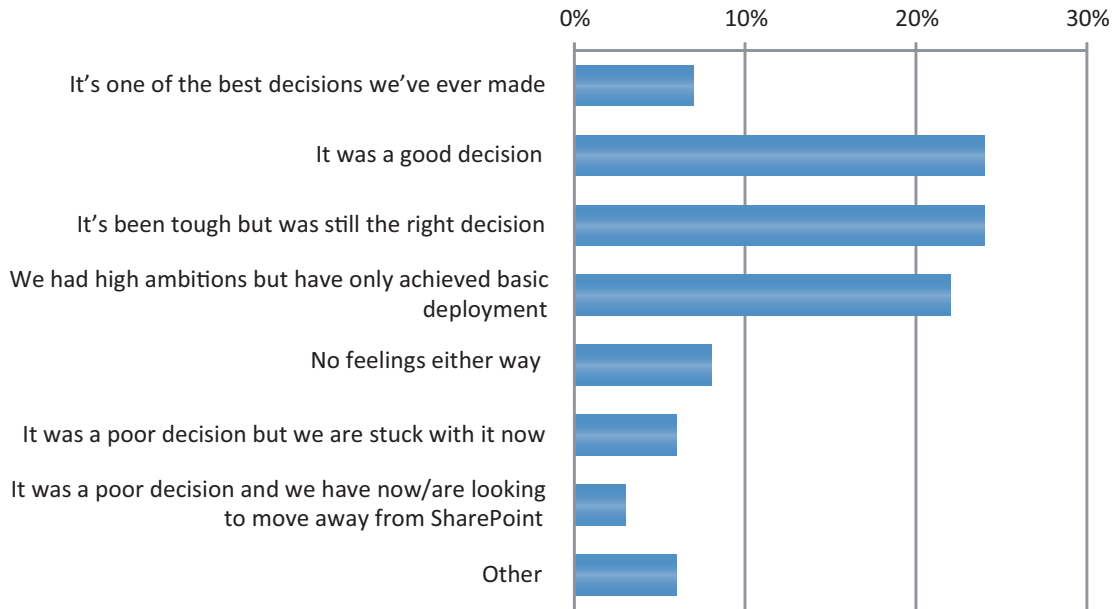*(N=298, normalized for N/A)*
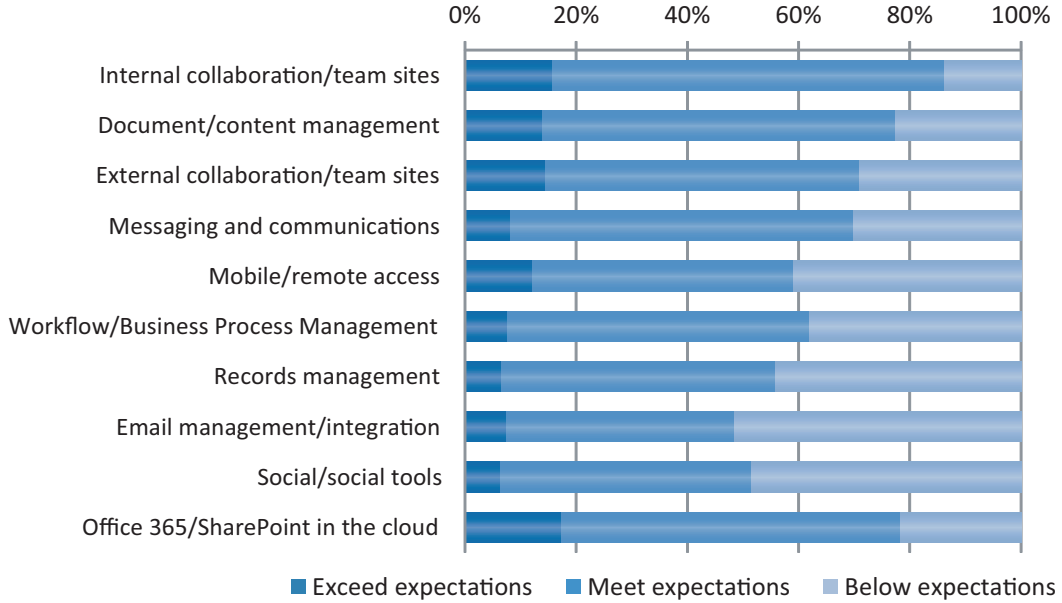
Appendix 2 provides a detailed analysis of how organizations are using SharePoint specifically for ECM, Collaboration and Social, and BPM.

Given the somewhat negative comments with respect to usability and functionality, it may come as a surprise to find that over half have positive feelings about implementing SharePoint, although 24% admit that it "has been tough". A further quarter have failed to deliver a system beyond basic deployment despite high intentions, potentially due to limited/inadequate functionality within SharePoint or a lack of internal skills and expertise to maximize the facilities available.

Almost 1 in 10 felt that implementing SharePoint was a bad decision including 3% who have moved away, or are in the process of moving, from SharePoint as a platform.

Feelings are very similar across all sizes of company, although the smallest are most likely to consider it a "best" decision with 11% of respondents, versus only 5% in larger companies.
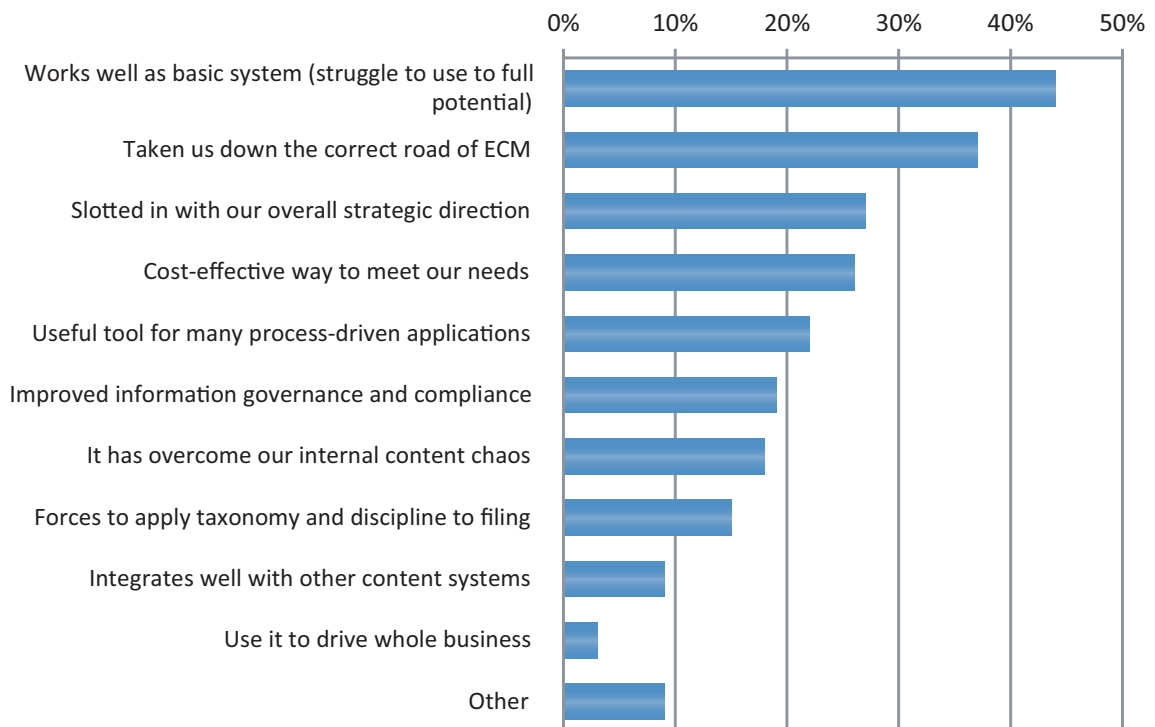
Figure 10: How would you describe your feelings now regarding implementing SharePoint? *(N=310)*

It's one of the best decisions we've ever made	
It was a good decision	
It's been tough but was still the right decision	
We had high ambitions but have only achieved basic deployment	
No feelings either way	
It was a poor decision but we are stuck with it now	
It was a poor decision and we have now/are looking to move away from SharePoint	
Other	

Forty-four percent of organizations feel that their decision to implement SharePoint was a good one because it works well as a basic system, but they admit that they struggle to use it to its full potential. This is hardly a glowing endorsement, although it could probably be said of any complex enterprise-level system. This figure grows to 50% for the largest organizations (who might be expected to have better skills) versus 28% of the smallest.

However, around a third feel that SharePoint has taken them down the correct road of ECM and around a quarter find SharePoint a cost-effective solution and that it has slotted into their overall strategic direction

Figure 11: Why do you feel your SharePoint implementation was a good decision? (Max three)
(N=262, Deploying SharePoint was not a bad decision)

Works well as basic system (struggle to use to full potential)	
Taken us down the correct road of ECM	
Slotted in with our overall strategic direction	
Cost-effective way to meet our needs	
Useful tool for many process-driven applications	
Improved information governance and compliance	
It has overcome our internal content chaos	
Forces to apply taxonomy and discipline to filing	
Integrates well with other content systems	
Use it to drive whole business	
Other	

Industry Watch

The SharePoint Puzzle - adding the missing pieces

Of equal interest are the thoughts of those for whom the SharePoint implementation was not a good decision and responses fall into two camps: functional inadequacy and inability to deploy and exploit. Over a third feels that SharePoint is not strong enough from a DM/RM/compliance perspective and a quarter cited management and governance as the issue. The second group of responses focused on a lack of corporate capabilities in terms of planning/executing (33%) and lack of skills to deploy properly (17%) but also ongoing management and the ability to take it beyond a basic system (15%).

Both groups of responses could potentially highlight one of the issues with solutions deployed centrally by IT without sufficient input from business units: detailed user requirements for document and records management can be sometimes overlooked because "SharePoint does ECM" and the organization wants a quick and easy collaboration portal.
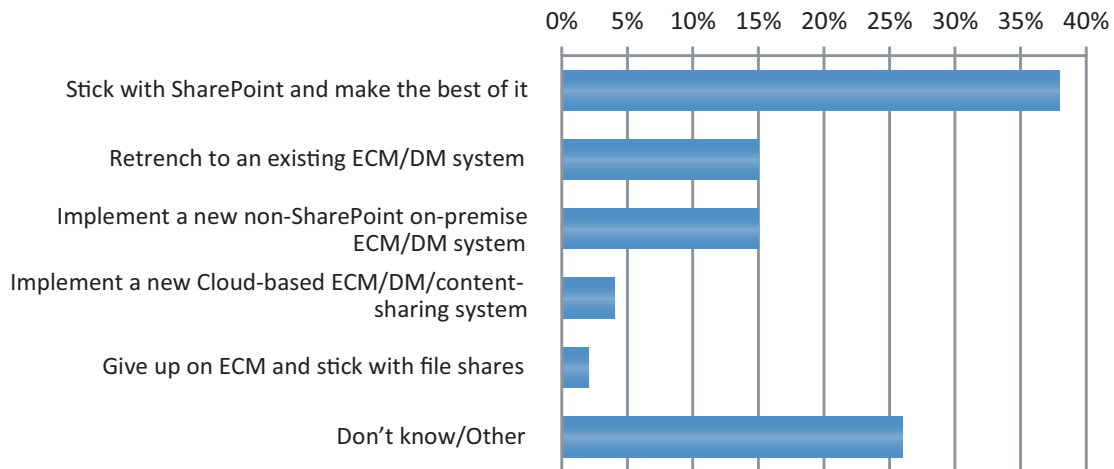
Figure 12: Why do you feel your SharePoint implementation was not a good decision? (Max two) *(N=83, Deploying SharePoint was not a good decision)*
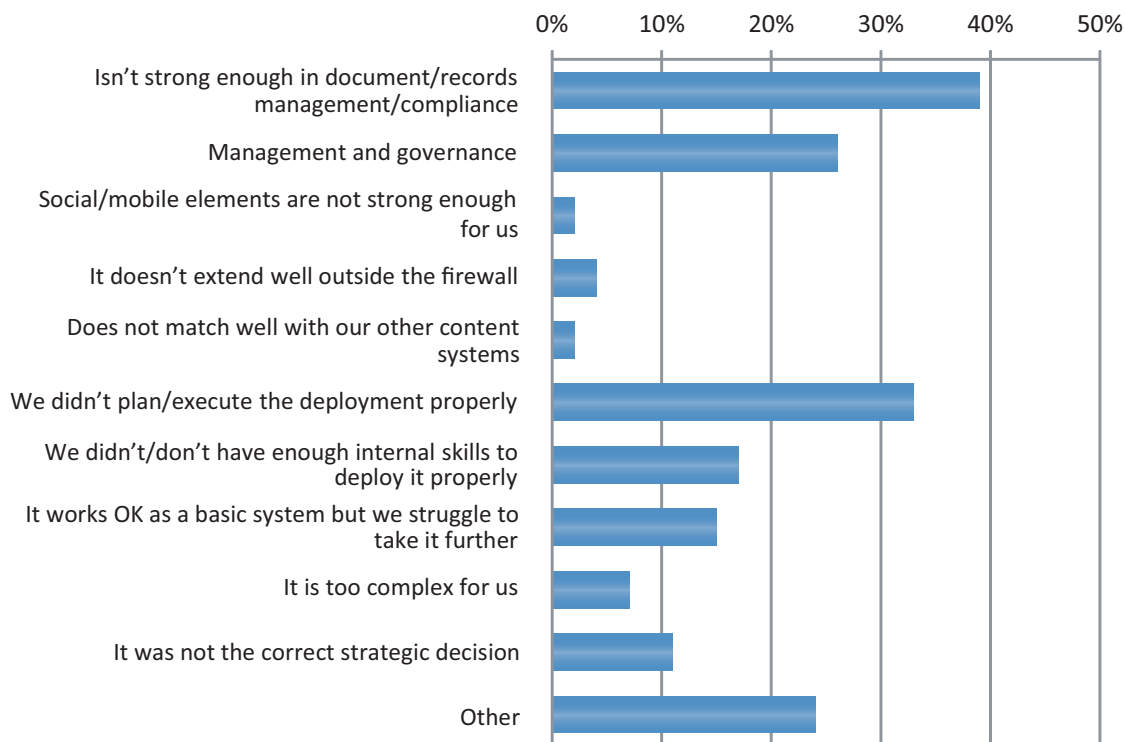
Despite believing that the move to SharePoint was a bad one around a third (38%) are planning on sticking with the solution and making the best of it.

However, not all are so forgiving. Almost one fifth plan to move to a new ECM/DM system including 4% in the cloud, 15% will go back to another existing system and 2% will give up on ECM altogether: a rather radical and rash decision if based purely on the fact that the their SharePoint installation did not meet expectations. Of more general concern is that over a quarter don't know what their plan is now.

Figure 13: What are your plans moving forward? *(N=73, Deploying SharePoint was not a good decision)*

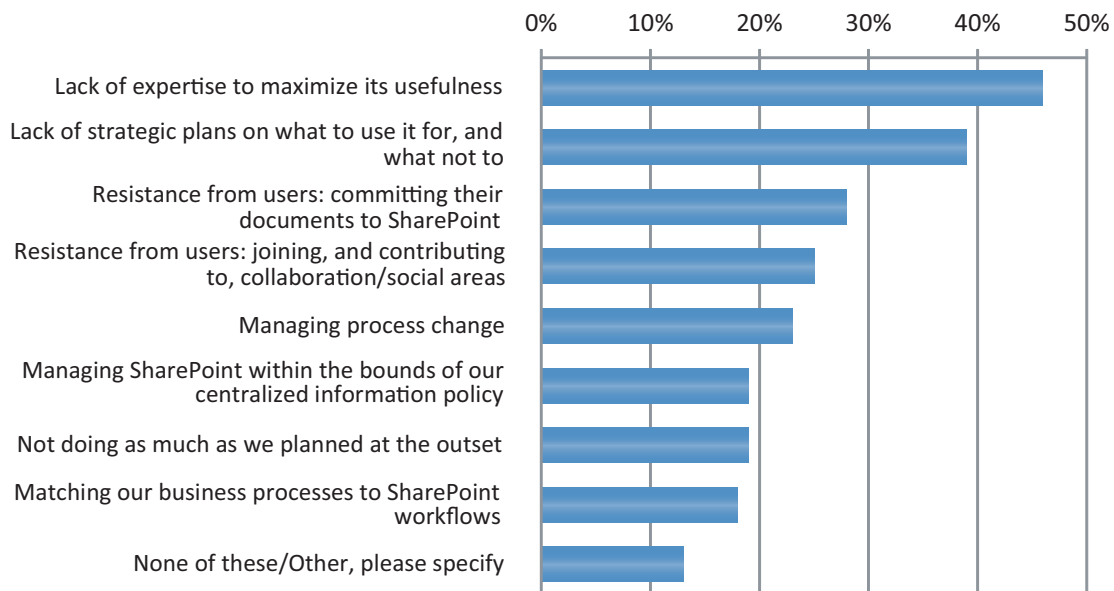|	
Stick with SharePoint and make the best of it	~38%
Retrench to an existing ECM/DM system	~15%
Implement a new non-SharePoint on-premise ECM/DM system	~15%
Implement a new Cloud-based ECM/DM/content-sharing system	~4%
Give up on ECM and stick with file shares	~3%
Don't know/Other	~33%

Ongoing Issues, Future Strategies and Spend Predictions

Having gone through the process (and some would say the pain) of implementing SharePoint as a solution the majority of organizations plan to continue with its use, but that does not mean that this approach is without issues.

The most prevalent of the business related issues is the lack of expertise within organizations to be able to get the best from SharePoint, with almost half (46%) feeling this pain. Over a third lack strategic plans of what to (and what not to) use SharePoint for, and around quarter are finding user resistance in both committing documents and contributing to collaboration areas.

Figure 14: What would you say are your biggest on-going business issues with your SharePoint system? (Max three) *(N=310)*

Lack of expertise to maximize its usefulness	~46%
Lack of strategic plans on what to use it for, and what not to	~38%
Resistance from users: committing their documents to SharePoint	~27%
Resistance from users: joining, and contributing to, collaboration/social areas	~25%
Managing process change	~22%
Managing SharePoint within the bounds of our centralized information policy	~15%
Not doing as much as we planned at the outset	~15%
Matching our business processes to SharePoint workflows	~15%
None of these/Other, please specify	~8%

The technical on-going areas of pain for users are largely focused on governance and missing functionality. The management of metadata and taxonomies is a problem for 41% of respondents and 30% are struggling with the management of site proliferation: both of these issues build on earlier findings relating to lack of expertise to manage SharePoint moving forward.

Missing, or limited, functionality is addressed in detail in the Flavors of SharePoint section (Appendix 2) but a quarter of respondents reinforce that feeling here.

Figure 15: What would you say are your biggest on-going technical issues with your SharePoint system? (Max three) (N=310)
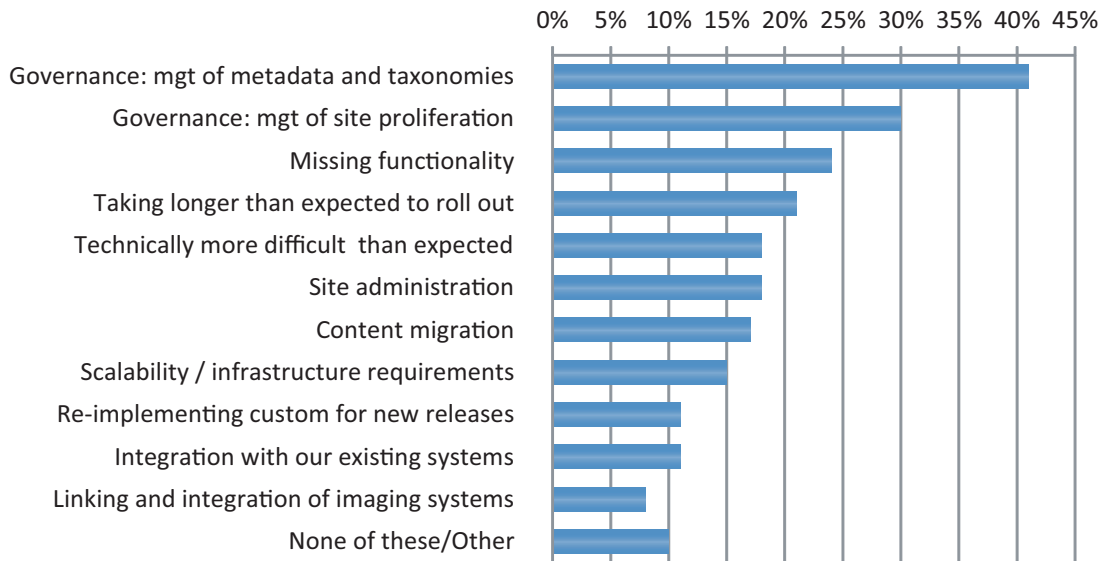

Faced with a SharePoint implementation that, whilst not fully performing to the desired standard, is firmly bedded into the organization, a quarter have decided to solve their own SharePoint puzzle by enhancing or extending the platform by means of in-house custom development or configuration. This approach, although understandable, is not the best practice advice, given the support issues with custom development of any type.

We asked which new/additional features users would like to see in SharePoint. A word-cloud showing the responses is shown in Appendix 3.

An almost equal number (23%) will follow best practice and purchase a 3rd party add-on to fill any gaps in their deployment, making sure that the add-on supplier is well-established, has the ability to follow SharePoint's upgrade path and can provide standards-based software.

Of concern are the 19% who have no resource to do anything to improve their implementation. This may reflect the fact that SharePoint "leaked" into the business without a business plan, and without consideration being given to on-going enhancement. Or it may be that these organizations consider SharePoint to be an application rather than a platform, overlooking the more expensive consulting/enhancement/configuration/integration costs generally related to platforms.
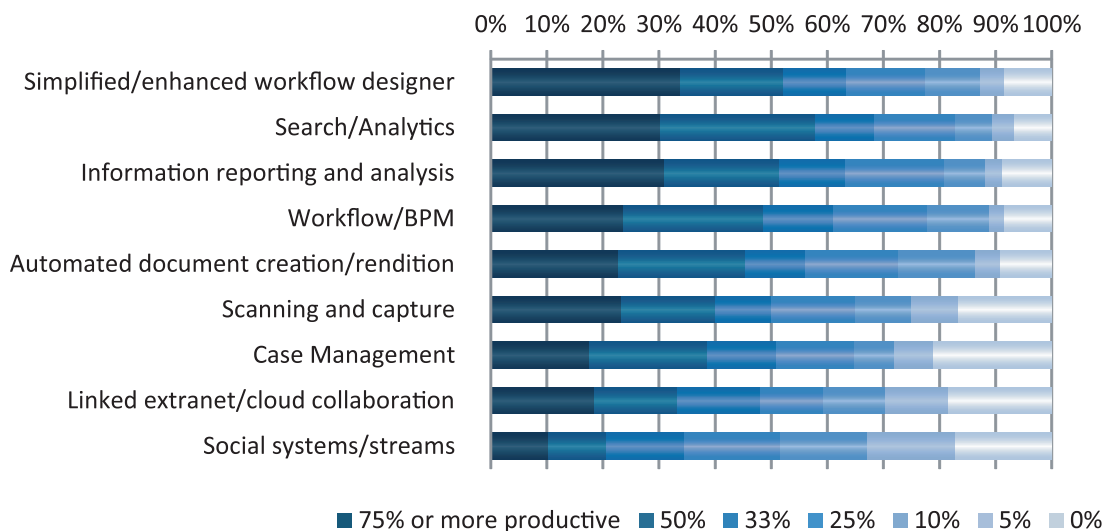
Figure 16: What generally is your preferred strategy to improve functionalities in your SharePoint implementation? *(N=345)*
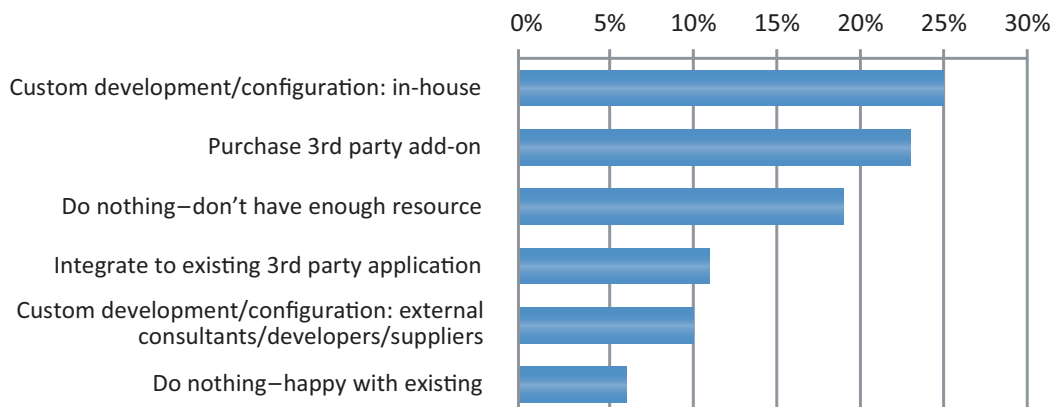
Enhanced SharePoint functionality should lead to a more effective environment, whether by built-in functions, custom developed tools or via 3rd party add-ons. The survey respondents concurred with this as over half feel they would be 50% more productive with enhanced workflow design, search and information reporting tools.

Enhanced cloud collaboration and social systems are also deemed to have 25% or better potential improvement on productivity. These areas tend to lead to so-called soft improvements - increases that are difficult to measure in financial terms but nonetheless have a large impact on the organization such as improved morale and communication.

Figure 17: How much more effective/productive do you think your processes would be if you had access to enhanced versions of the following (i.e. how much better than provided by SharePoint out of the box)? (N=345)

Legend: ■ 75% or more productive ■ 50% ■ 33% ■ 25% ■ 10% ■ 5% □ 0%

Categories:
- Simplified/enhanced workflow designer
- Search/Analytics
- Information reporting and analysis
- Workflow/BPM
- Automated document creation/rendition
- Scanning and capture
- Case Management
- Linked extranet/cloud collaboration
- Social systems/streams

Half or more of respondents feel that many of their processes would be 25-50% more effective or productive with enhanced capabilities in workflow/BPM, search/analytics, document creation, scanning and capture, case management and social/cloud collaboration.

3rd Party Add-ons

The approach Microsoft adopted when creating SharePoint was to provide out-of-the-box functionality in many areas that would cater for the masses, but, somewhat uniquely at the time, also to encourage, 3rd party developers to create plug-in components to extend the functionality -: perhaps a realization early on that Microsoft did not have all of the pieces to complete the SharePoint jigsaw. The market for add-ons as they are now known is huge and add-ons exist for areas as diverse as digital signatures, business intelligence and meta-data management.

Over a third of organizations say they are using 3rd party add-ons with a further 15% planning to do so in the next 12 months. Only 34% have no plans to make use of add-ons to extend SharePoint capabilities.

Figure 18: Do you use any 3rd-party add-on/integration products to improve the functionality of SharePoint? (N=270)

- No plans 34%
- Yes 39%
- Planning in next 12 months 15%
- Likely in 2-3 years 12%
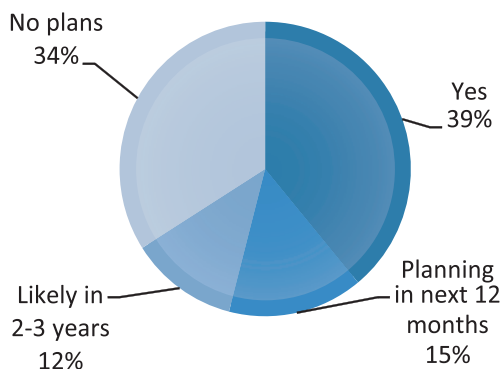
As discussed above, the range of add-ons available is enormous. The chart below plots a wide range of add-on categories in terms of actual use, planned usage and the associated growth. The complete data are shown for detail and completeness in Appendix 4 but overall it can be seen that the areas of particular

growth are largely social, mobile and collaborative but extensive growth is also forecast in records management and automated document creation – all areas where respondents highlighted issues with the SharePoint default functionality.

Figure 19: Do you use any 3rd-party add-on/integration products to improve the functionality of SharePoint?
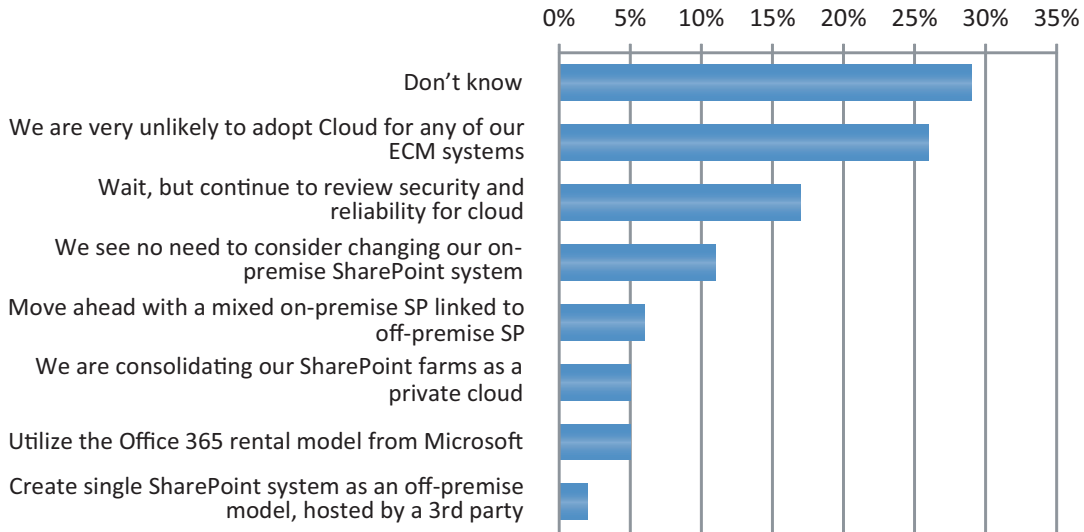*(N=270, capped at 400%)*

Legend: ■ Using ■ Firm plans in next 12 months ■ % Growth
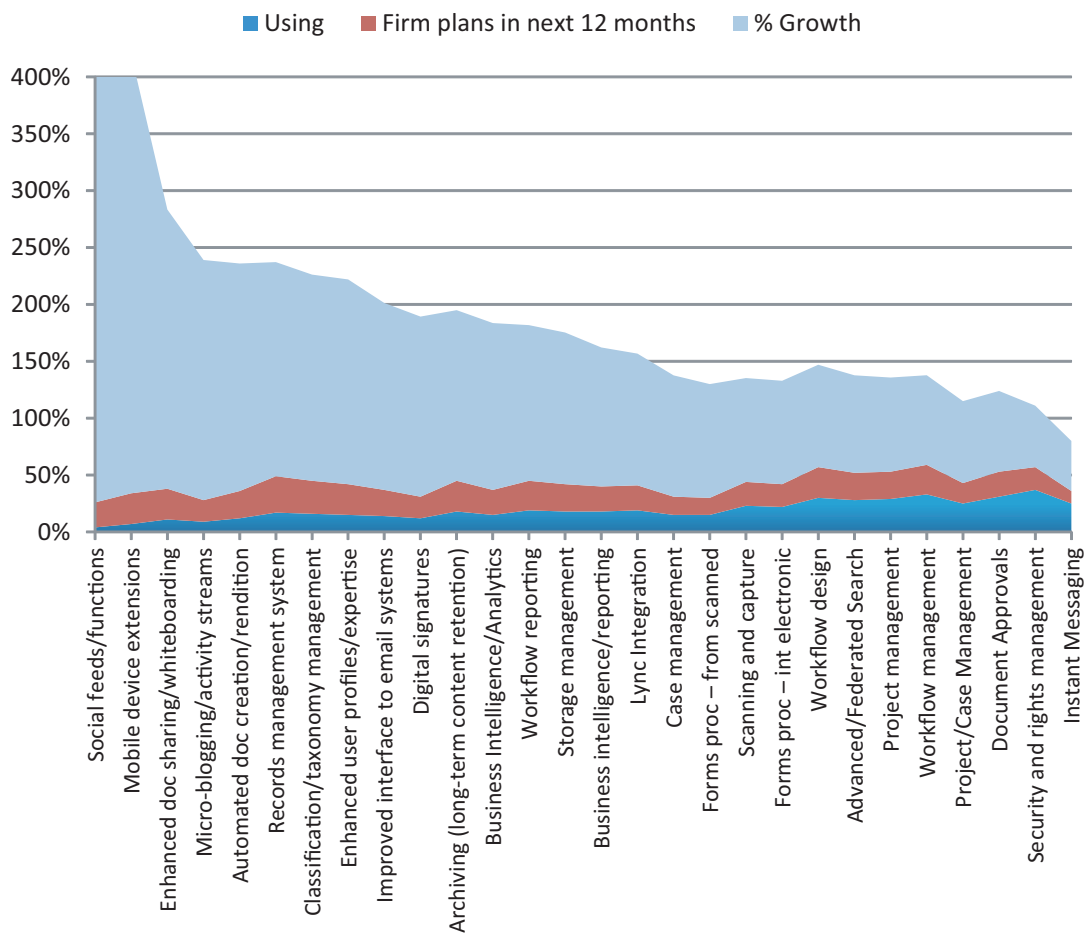
> Predicted growth in the use of 3rd party automated document creation/rendition add-ons is forecast at 200%. Business intelligence functionality shows a 122% predicted growth.

Some have argued that issues relating to deployment and on-going management can be, at least partially, solved by moving to a cloud-based SharePoint implementation. This may be true but over half of our respondents have no such plans to do so.

Around quarter of organizations don't know what their strategy is for cloud deployment, or potentially if they even have one. This is not a huge surprise given the relatively recent introduction of applicable cloud services but will be a figure to keep a close eye on over future SharePoint surveys.

Having said that, one fifth are deploying some form of hosted SharePoint including a lower than expected 5% planning to use Microsoft's Office 365 (certainly when compared to predictions from Microsoft itself). It should be noted that at the time this report was created, various aspects of the ability for non-US organizations to legally store content subject to the Data Protection Act on US servers are still being discussed. It is anticipated that should a legal precedent be set confirming that non-US data can be legally stored on US servers this figure will grow.

Figure 20: What is your strategy for deploying SharePoint in the cloud (ie, hosted off-premise)? *(N=353)*

Category	
Don't know	
We are very unlikely to adopt Cloud for any of our ECM systems	
Wait, but continue to review security and reliability for cloud	
We see no need to consider changing our on-premise SharePoint system	
Move ahead with a mixed on-premise SP linked to off-premise SP	
We are consolidating our SharePoint farms as a private cloud	
Utilize the Office 365 rental model from Microsoft	
Create single SharePoint system as an off-premise model, hosted by a 3rd party	

> Predicted growth in the use of 3rd party social feeds/function add-ons is forecast at a massive 550%, potentially leading to around a quarter of sites using social within SharePoint

Spend

As a final analysis our respondents shared their SharePoint related spending plans with us. The outlook all round is very positive with a third increasing spend on topics such as integration to external repositories and SharePoint training.

31% plan to maintain their level of spend on 3rd party add-ons with a further fifth spending more on these.

Sales of SharePoint licenses is still growing at a strong rate, indicating that saturation point is far from being reach as yet in most organizations.

Figure 21: What is your proposed SharePoint-related spend in the following areas for the next 12 months compared to the last 12 months? *(N=345, excl. "same" line length indicates "We don't spend anything on this.)*

■ More ■ Less
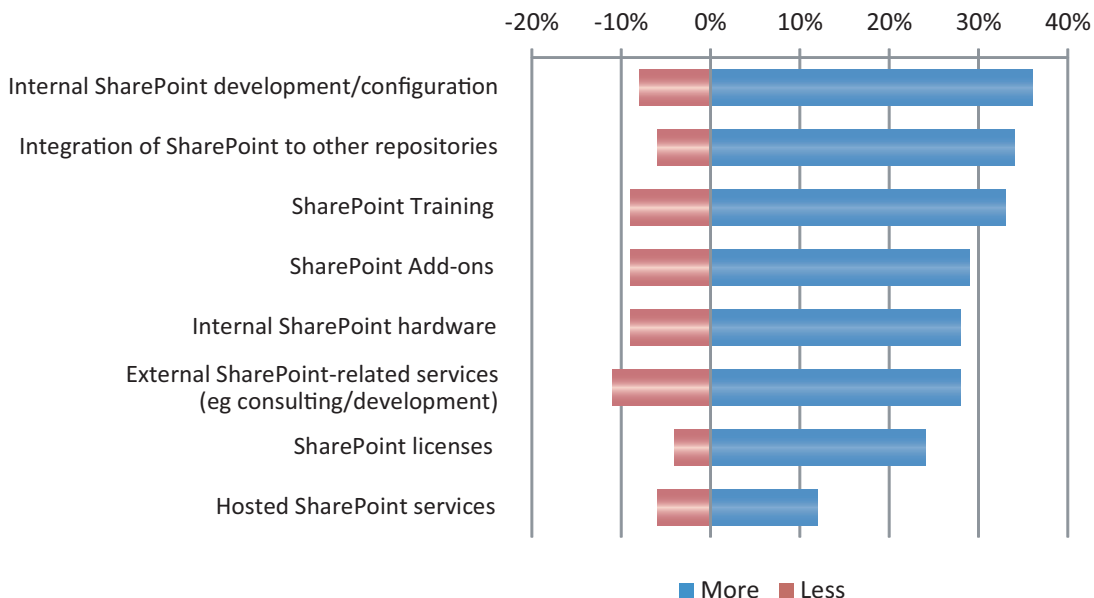
Conclusion and Recommendations

Internal collaboration, file share replacement and the creation of an intranet/portal were the primary drivers for SharePoint deployment, with Central IT making the original decision to implement the solution and being responsible for on-going management. Deployment in many organizations is now truly enterprise-wide, especially in small businesses, with over 70% having at least half of their staff using SharePoint once a week or more. However, most are not using SharePoint as their primary ECM system and almost half run alternative ECM systems alongside SharePoint.

The majority feel that the decision to implement SharePoint was the right one, although many have reservations about its scalability and long term archiving capabilities. Content migration has proved difficult, information governance did not meet expectations, and overall, SharePoint is still considered to be technically difficult to use and takes longer than expected to roll out.

Areas such as records management, workflow and social tools are considered to be lacking in capability, indeed the use of SharePoint as a social tool does not appear to be gaining any traction – most simply use the collaborative element as opposed to dedicated social tools.

Meta-data governance and managing site proliferation are the biggest on-going technical issues and a number are looking to resolve these issues by purchasing 3rd party add-ons in these areas as well as workflow design and document approvals. Over half feel that they would be at least 50% more productive with enhanced workflow, search, information reporting and document creation tools.

From a business perspective, the lack of strategic planning for how to make the best use of SharePoint is a major concern for organizations, as are lack of expertise to get the best out of the platform, and a shortage of resources to enhance it. However, overall spend on SharePoint is set to rise with integration to other repositories set for the biggest growth, and social functionality seeing the largest growth as an add-on.

Overall SharePoint will continue to dominate the multi-discipline platform market with its position and strength being enhanced by the growing appreciation of it as a platform, not an application. As organizations understand that SharePoint operates best as in this underlying platform mode, providing baseline collaboration, ECM and portal facilities, the adoption and implementation of 3rd party add-ons will blossom, to enhance capabilities specific to particular business needs.

As such, successfully solving the SharePoint Puzzle for any given business needs to be a carefully managed combination of corporate strategy, end-user ownership, IT implementation and 3rd party enhancement.

Recommendations

- Understand the business reasons for wanting to deploy SharePoint in an organization.

  – It's not enough that IT can deploy it – what is the business driver?

- Plan your deployment carefully: discuss with IT, end-users and business owners.

  – Engagement of end users throughout the process is critical – lack of contribution to the solution once running can be fatal.

- Evaluate the key business functionality required of SharePoint.

  – Then decide if vanilla SharePoint can deliver or if a 3rd party add-on is required.

- When selecting a 3rd party add-on look for:

  – An established supplier.

  – A standards based add-on (eg CMIS).

  – Ongoing support and upgrade/migration roadmap for future releases of SharePoint.

- Identify all of the external repositories and systems that SharePoint needs to connect to and ensure that suitable connectivity can be created.
  - Any such connectivity should be two way, read/write and fully conform to the security and permission requirements of both sides.
- If moving to a cloud-based SharePoint solution ensure that:
  - Data connectivity between other (non) cloud applications is possible.
  - Migration away from the cloud-based service is an option.
  - Legal aspects such as geographic data protection rules are fully conformed to.
- Budget for suitable levels of ongoing training spend to ensure your organization gets the best out of vanilla SharePoint.
- If required, call in expert consultants to identify suitable 3rd party add-ons to complement your existing solution.

References

1 AIIM SharePoint Industry Watch 2011 – "Using SharePoint for ECM"

http://www.aiim.org/Research/Industry-Watch/SharePoint-2011

Appendix 1: Survey Demographics

Survey Background

551 individual members of the AIIM community took the survey between May 30 and June 25, 2012, using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 65,000 AIIM community members.

Organizational Size

Survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 38%, with mid-sized organizations of 500 to 5,000 employees also at 38%. Small-to-mid sized organizations with 10 to 500 employees constitute 24%. Respondents (63) from organizations with less than 10 employees or from suppliers of ECM products and services have been eliminated from the results.
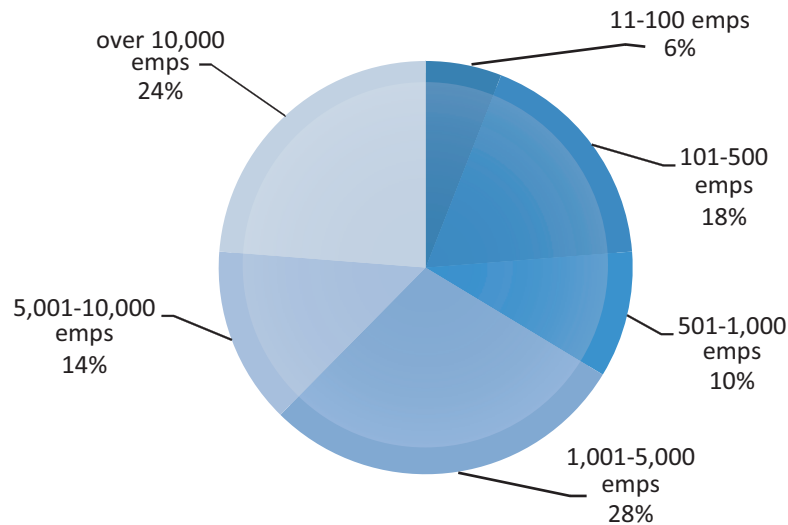
Geography

71% of the participants are based in North America, with most of the remainder (18%) from Europe.
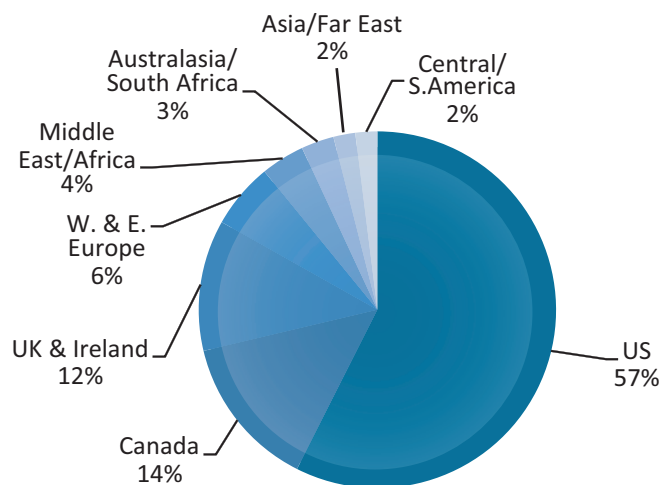
Industry Sector

Local and National Government together make up 21%, Finance, Banking and Insurance represent 14% and Education 7%. The remaining sectors are fairly evenly split. To avoid bias, suppliers of ECM products and services have been eliminated from all of the results.

Pie chart segments:
- Media, Publishing, Web 1%
- Life Sciences, Agriculture 2%
- Professional Services & Legal 3%
- Pharmaceutical and Chemicals 3%
- Charity, Not-for-profit 3%
- IT & High Tech - not ECM 4%
- Healthcare 4%
- Consultants 4%
- Retail, Transport, Real Estate 5%
- Mining, Oil & Gas 5%
- Manufacturing, Aerospace 5%
- Engineering & Construction 5%
- Utilities, Power, Water, Telecoms 7%
- Education 7%
- Insurance 6%
- Finance/Banking 8%
- Government & Public Services - National 7%
- Government & Public Services - Local/State 14%
- Other 7%

Job Roles

37% of respondents are from IT, 30% have a records management or compliance role, 15% are line-of-business managers, and 6% are SharePoint administrators.

Pie chart segments:
- President, CEO, Managing Director 1%
- Line-of-business exec, dept head or process owner 6%
- Consultant or Project Manager - Business 8%
- SharePoint administrator 6%
- Consultant or Project Manager – IT 13%
- Systems architect 5%
- Head of IT 4%
- IT staff 15%
- Head of records/compliance/information management 11%
- Records or document management staff 19%
- Other 12%
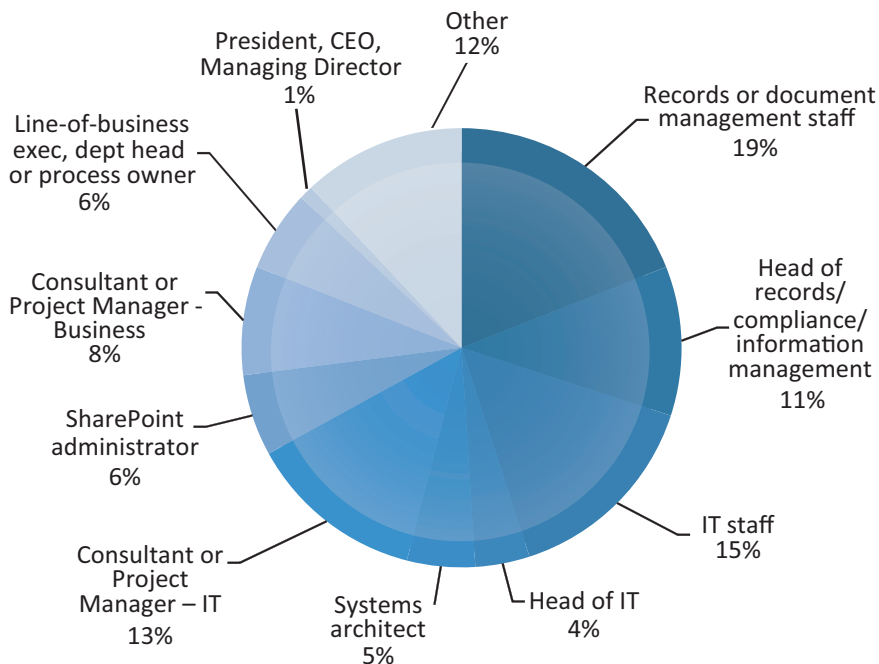
Appendix 2: Flavors of SharePoint

The SharePoint platform has many different faces and potential uses: project sites, intranet portal, file share replacement, etc. Users of these different flavors of SharePoint have very specific needs and will use functionality particular to their own requirements. Around two thirds are using SharePoint for ECM (70%) and collaboration (66%): although not necessarily both together. Just under half (43%) are making use of business process management.

Using For	Yes	No
ECM	70%	30%
Collaboration/Social	66%	34%
BPM	43%	57%

SharePoint for ECM

Over two thirds of respondents said that they are using SharePoint for electronic content management, within which almost all (91%) are currently using so called "live document management" (check in/out) and a further 5% are planning to. Almost as many (79%) also see SharePoint as a file share replacement.

Over half (55%) use some form of advanced or federated search within SharePoint

Less than half (40%) are using SharePoint for electronics records management (ERM) and/or long term archiving but no further analysis was possible to determine if those not using SharePoint for these purposes are using alternative products or whether these areas are being ignored.

SharePoint also continues not to be used for email management with almost two thirds (61%) having no plans to use this capability. However, from a low starting point we shall see later that large growth is expected in the use of 3rd party add-ons in this area: suggesting that the facilities provided by out-of-the-box SharePoint are not strong enough or are difficult to use.

Figure 22: How would you describe your use of SharePoint in the following areas?
(N=193, normalized for N/A)
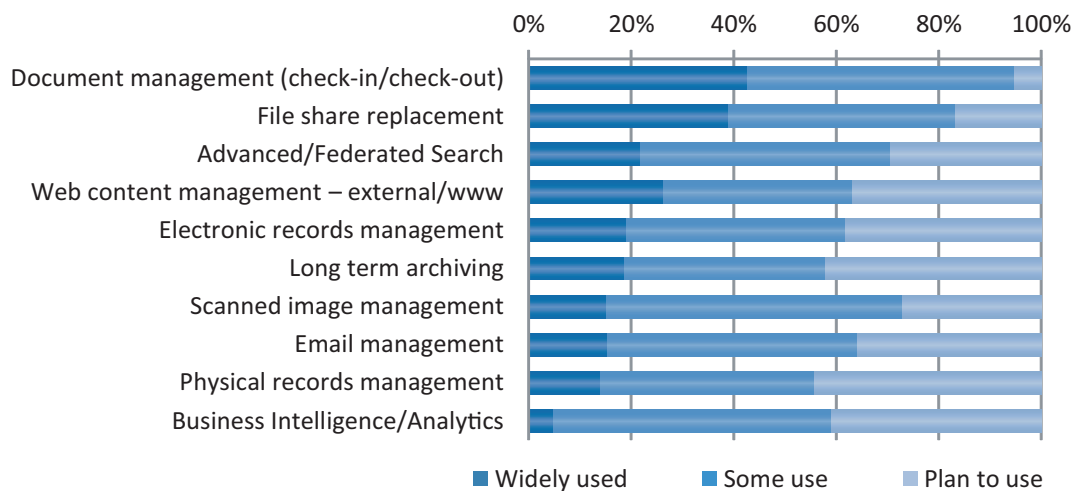
Following on from the analysis of what ECM functionality is being used, we look at how satisfied users are with these capabilities. Strong analogies can be made between the two result-sets with document management and file share replacement at least partially satisfying three quarters of users: indeed over half are completely satisfied with SharePoint as a DM tool.

Only one third (30%) are completely happy with the management of scanned images, and content security and rights.

Only 20% are satisfied with long term archiving and records management (both electronic and physical), possibly due to SharePoint's limited enterprise-wide experience and relatively new records management functionality. A similar number (16%) were dissatisfied with using SharePoint as an email repository.

Figure 23: How well does SharePoint satisfy your needs in the following areas? *(N=193, normalized for N/A)*

■ Completely satisfies ■ Partially satisfies ■ Does not satisfy
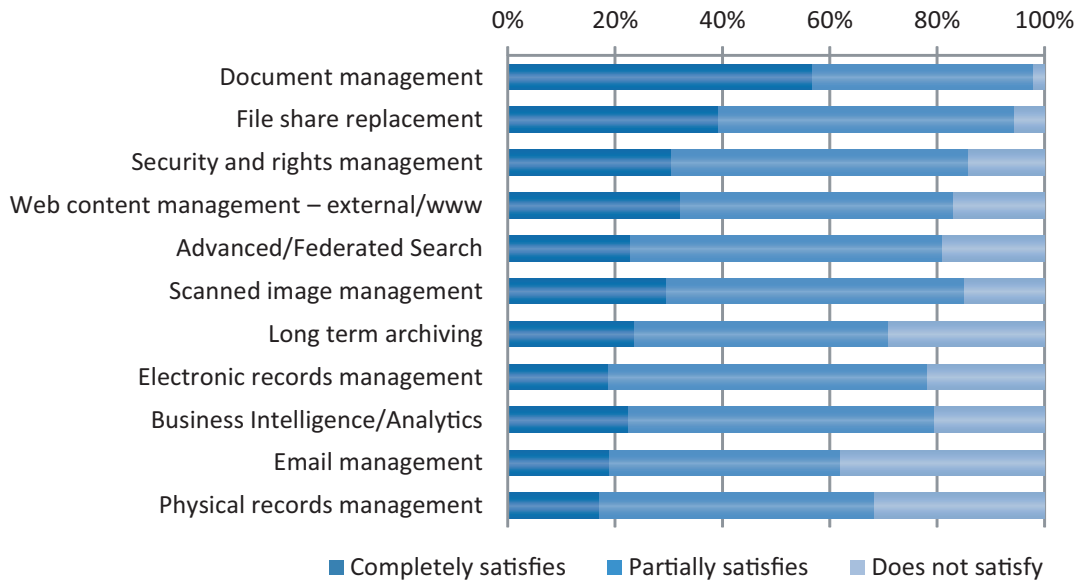
SharePoint for Collaboration/Social

SharePoint has been widely touted as a means to provide simple-to-deploy team and project sites, allowing simple sharing and collaboration for users, and indeed two thirds of our respondents are using it in this manner - within which the majority makes use of the basic collaboration/workspaces/team site facilities. Additionally well over half (60%) are deploying intranet content management by way of intranet/staff-facing sites.

Despite concerns expressed earlier, external sharing of content to users beyond the firewall is strong at 41%. An additional 17% have plans to provide this in the future.

Despite the levels of adoption of various social media facilities and solutions within business as a whole, it appears that vanilla SharePoint is not the preferred tool for social and is largely being used with a collaboration focus: over half have no plans to use social messaging, mobile access or folksonomies, with social messaging in wide-use in only 5% of sites.

Figure 24: How would you describe your use of SharePoint in the following areas? *(N=178)*

■ Widely used ■ Some use ■ Plan to use
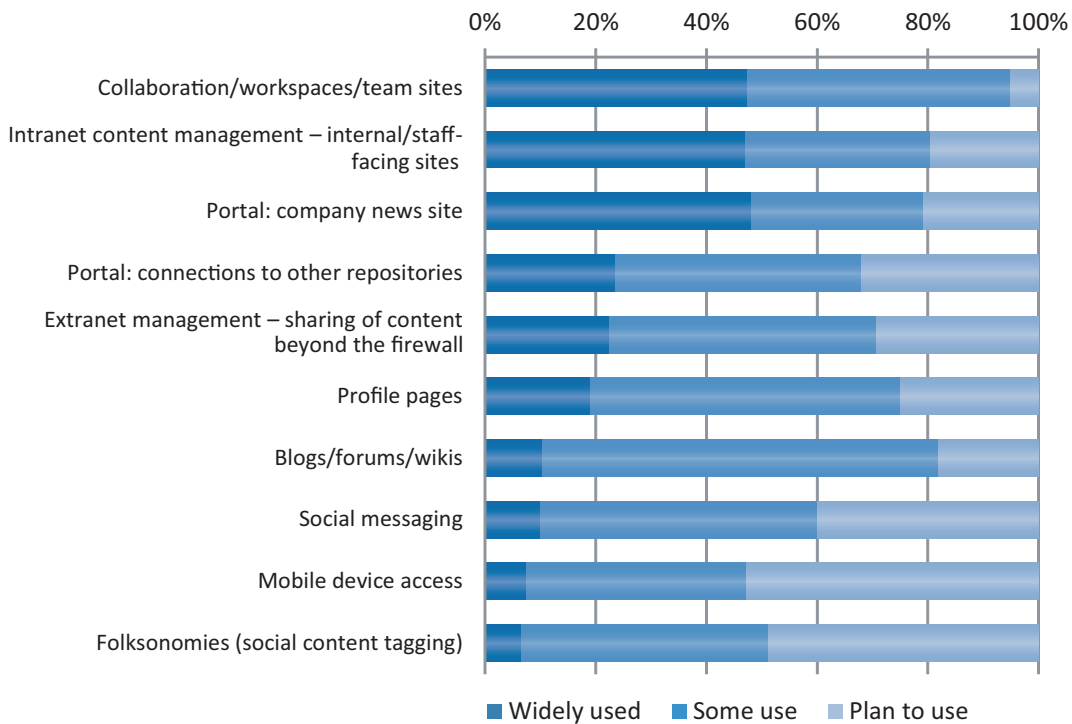
Most organizations are fully or partially satisfied with their use of SharePoint in the collaboration, team & portal site, and intranet content management areas. Given the high levels of deployment for exactly these capabilities, SharePoint appears to be performing as expected for its collaboration aspects at least.

Unfortunately social needs are not being satisfied (less than 15% are completely satisfied with social messaging, mobile access and folksonomies) quite possibly explaining why organizations have not deployed them and there is such a high predicted growth of 3rd party add-ons in this area.

SharePoint's ability to connect to other repositories also comes in for criticism from a collaboration and social perspective with only one fifth (22%) fully satisfied.

Figure 25: How well does SharePoint satisfy your needs in the following areas? *(N=178, normalized for N/A)*
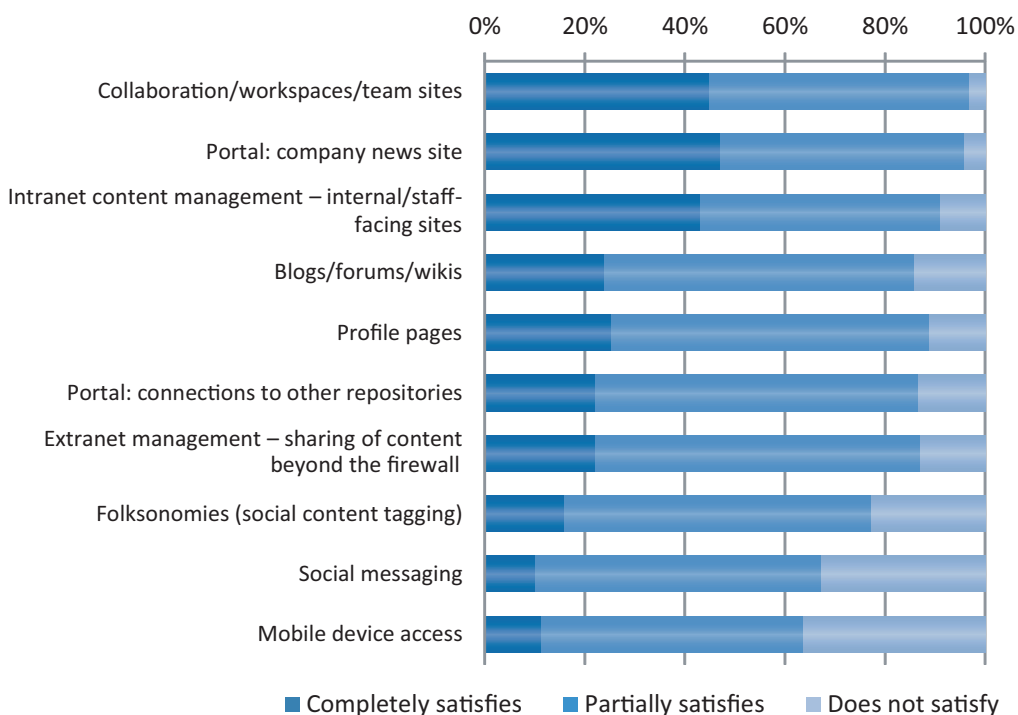
SharePoint for Document Creation/Workflow/Business Process Management (BPM)

Less than half (43%) of organizations claim to be using BPM in SharePoint. However, that figure may be artificially low, given that most SharePoint deployments make use of workflow to some degree.

Within those that do use BPM, there is almost universal (97%) use of workflow. A further three quarters make use of document approvals (78%), in itself a form of workflow, and project management (71%).

Almost half have no plans to use SharePoint for forms processing.

Figure 26: How would you describe your use of SharePoint in the following areas? *(N=137, normalized for N/A)*

Legend: ■ Widely Used ■ Some Use ■ Plan to Use
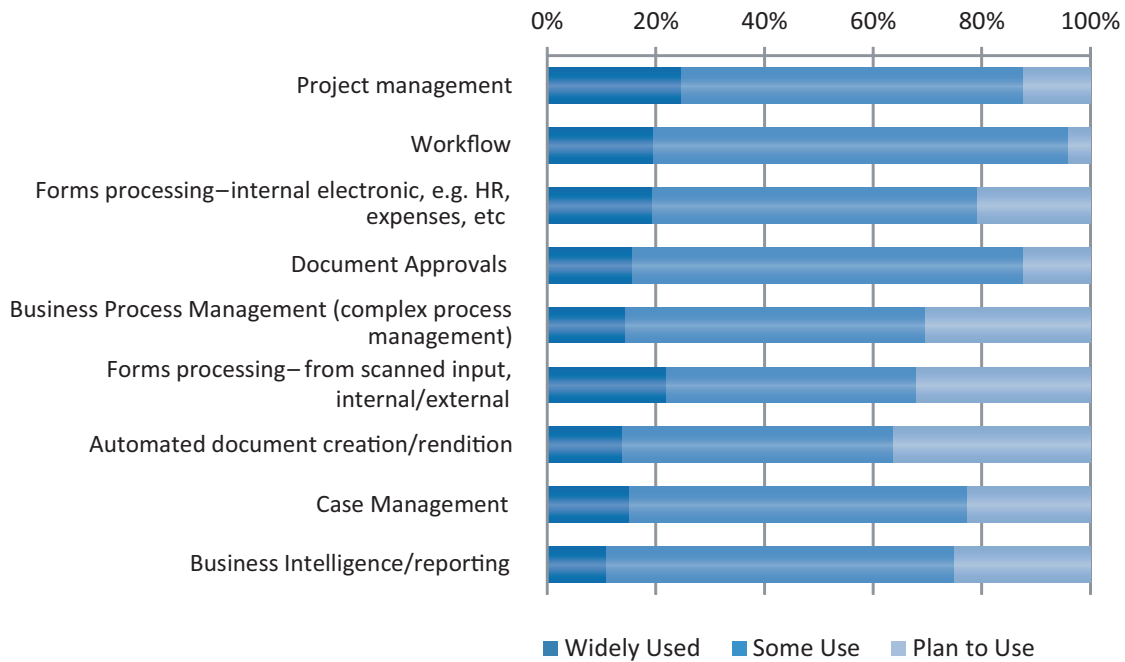
In a similar vein to social tools, BPM functionality within SharePoint is not completely satisfying our respondents with no more than 25% completely satisfied with anything BPM related. However, in general terms, most are partially satisfied even for topics such as business intelligence.

Those areas that do show dis-satisfaction include complex process management (11%), automated document creation/rendition, also known as document automation or generation, (10%) and forms processing (9%). Once more, these correlate strongly with the areas not being widely used, again begging the question as to whether the SharePoint functionality in these areas is sufficient for the task in most organizations.

Figure 27: How well does SharePoint satisfy your needs in the following areas? *(N=137, normalized for N/A)*

Legend: ■ Completely Satisfies ■ Partially Satisfies ■ Does Not Satisfy
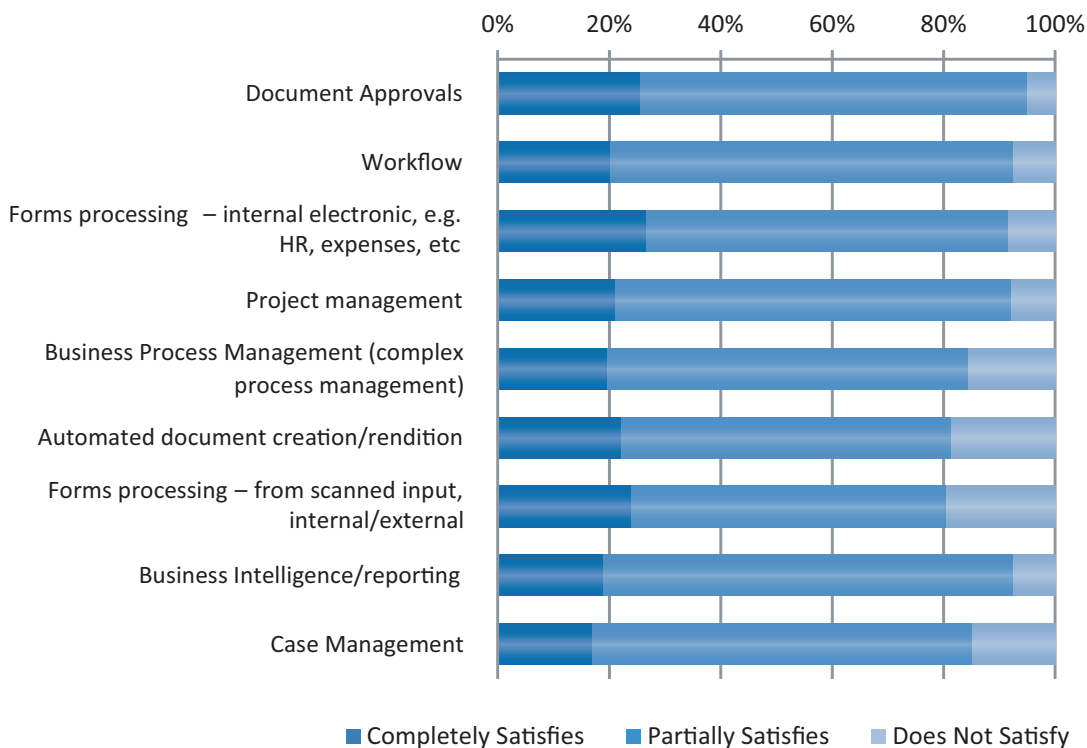
Appendix 3: Open Questions

Which additional features would you like to see in SharePoint?

This question returned a vast range of responses, as visualized below in a word cloud, but topics such as improved compliance and meta-data management, integration to other system, social and email integration features, and management of physical records were frequently observed.

Appendix 4: 3rd Party Add-on Usage

	Using	Firm plans in next 12 months	Growth
Additional social feeds/functions	**4%**	**22%**	**550.00%**
Mobile device extensions	**7%**	**27%**	**385.71%**
Enhanced document sharing/whiteboarding	**11%**	**27%**	**245.45%**
Micro-blogging/activity streams	**9%**	**19%**	**211.11%**
Automated document creation/rendition	**12%**	**24%**	**200.00%**
Records management system	**17%**	**32%**	**188.24%**
Classification/taxonomy management	**16%**	**29%**	**181.25%**
Enhanced user profiles/expertise	**15%**	**27%**	**180.00%**
Integrated/improved interface to email systems	**14%**	**23%**	**164.29%**
Digital signatures	**12%**	**19%**	**158.33%**
Archiving (long-term retention of content)	**18%**	**27%**	**150.00%**
Business Intelligence/Analytics	**15%**	**22%**	**146.67%**
Workflow reporting	**19%**	**26%**	**136.84%**
Storage management (externalization of content)	**18%**	**24%**	**133.33%**
Business intelligence/reporting	**18%**	**22%**	**122.22%**
Lync Integration	**19%**	**22%**	**115.79%**
Case management	**15%**	**16%**	**106.67%**
Forms proc – from scanned, internal/external	**15%**	**15%**	**100.00%**
Scanning and capture	**23%**	**21%**	**91.30%**
Forms proc – int electronic, e.g. HR, expenses, etc	**22%**	**20%**	**90.91%**
Workflow design	**30%**	**27%**	**90.00%**
Advanced/Federated Search	**28%**	**24%**	**85.71%**
Project management	**29%**	**24%**	**82.76%**
Workflow management	**33%**	**26%**	**78.79%**
Project/Case Management	**25%**	**18%**	**72.00%**
Document Approvals	**31%**	**22%**	**70.97%**
Security and rights management	**37%**	**20%**	**54.05%**
Instant Messaging	**25%**	**11%**	**44.00%**

The SharePoint Puzzle
- adding the missing pieces

IBM

IBM ECM provides improved workforce effectiveness by enabling companies to transform their business processes; access and manage all forms of content; secure and control information related to compliance needs, and optimize the infrastructure required to deliver content anywhere at anytime.

IBM ECM automates and streamlines all records-based activities, eliminates burdensome end-user participation, enforcing compliance and creating business advantage while reducing the cost of compliance and risk management through the delivery of an integrated, open platform that provides interoperability with the widest selection of IT systems, thereby reducing costs and improving efficiency.

www.ibm.com/software/ecm