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# Top Trends Shaping the ECM Market

**Cheryl McKinnon, Principal Analyst**

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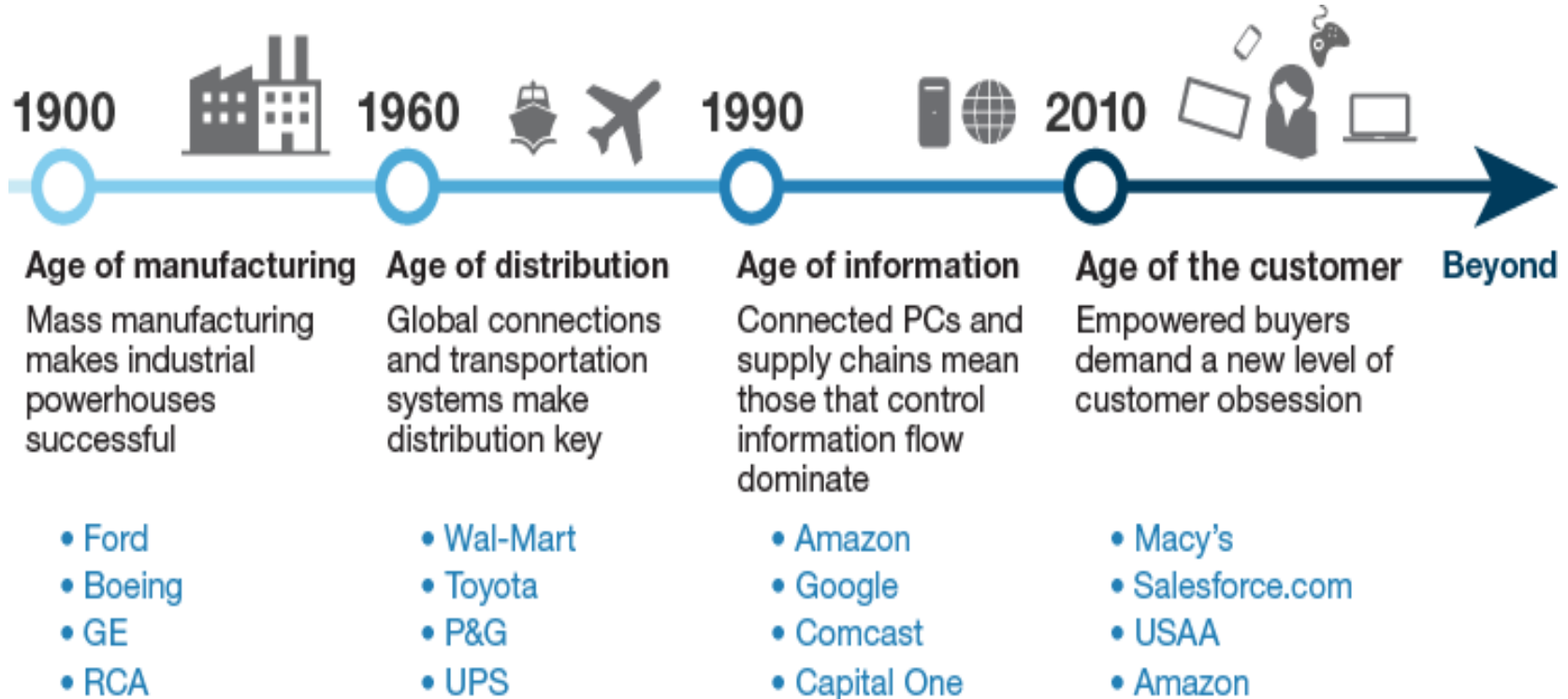
# Agenda

- › *The evolution of enterprise content management (ECM)*
- › *Where are we today? Key ECM trends*
- › *What does it mean in the Indian market?*
- › *Q&A*

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# Empowered customers have given rise to a new era



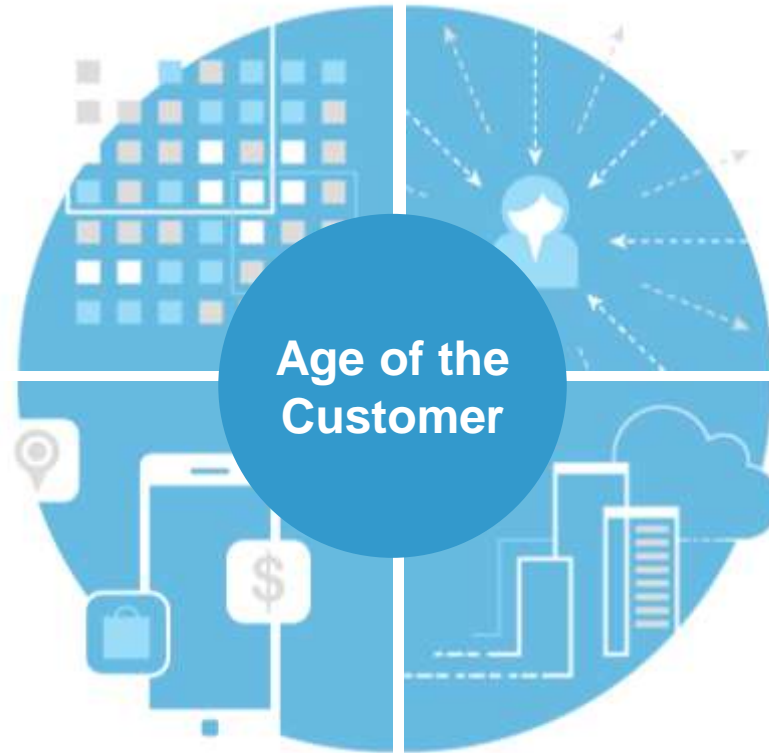
# Four key market imperatives drive change

**Turn big data  
into business  
insights**

**Transform  
the customer  
experience**

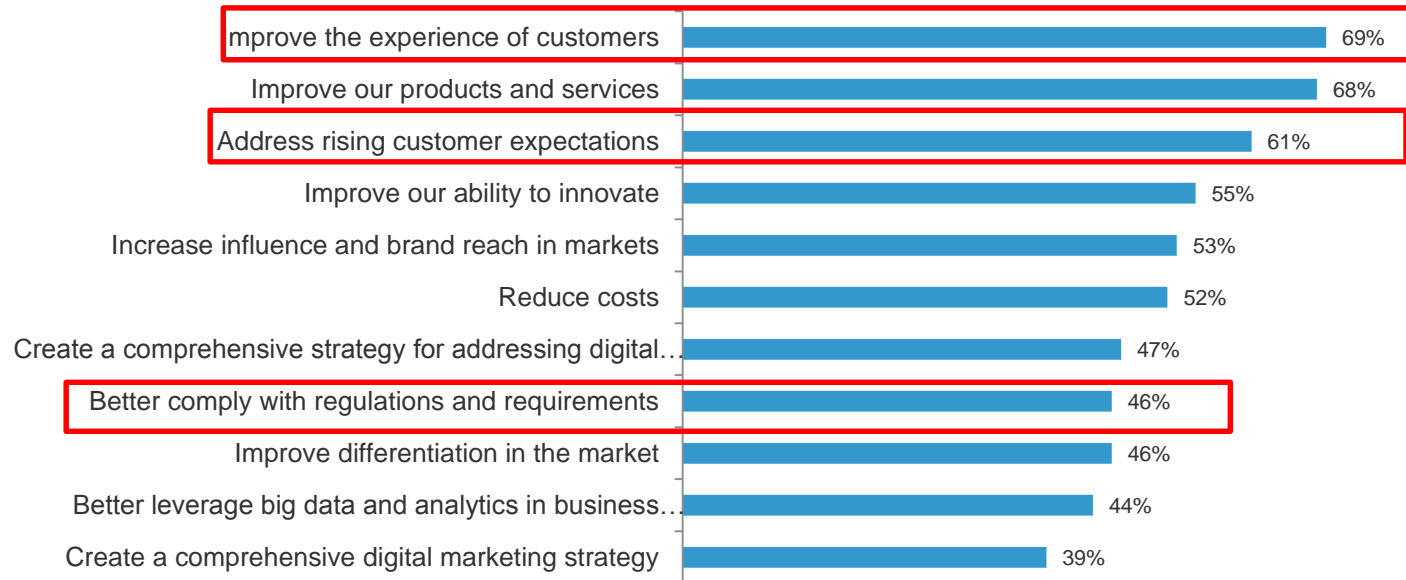
**Embrace  
the mobile  
mind shift**

**Accelerate  
your digital  
business**



# Business priorities shift in response in response to the age of the customer

Which of the following initiatives are likely to b your organization's top business priorities over the next 12 months? (high or critical priority)



Base: 14,596 business and technology decision-makers

Source: Forrester's Business Technographics Global Priorities And Journey Online Survey, 2015



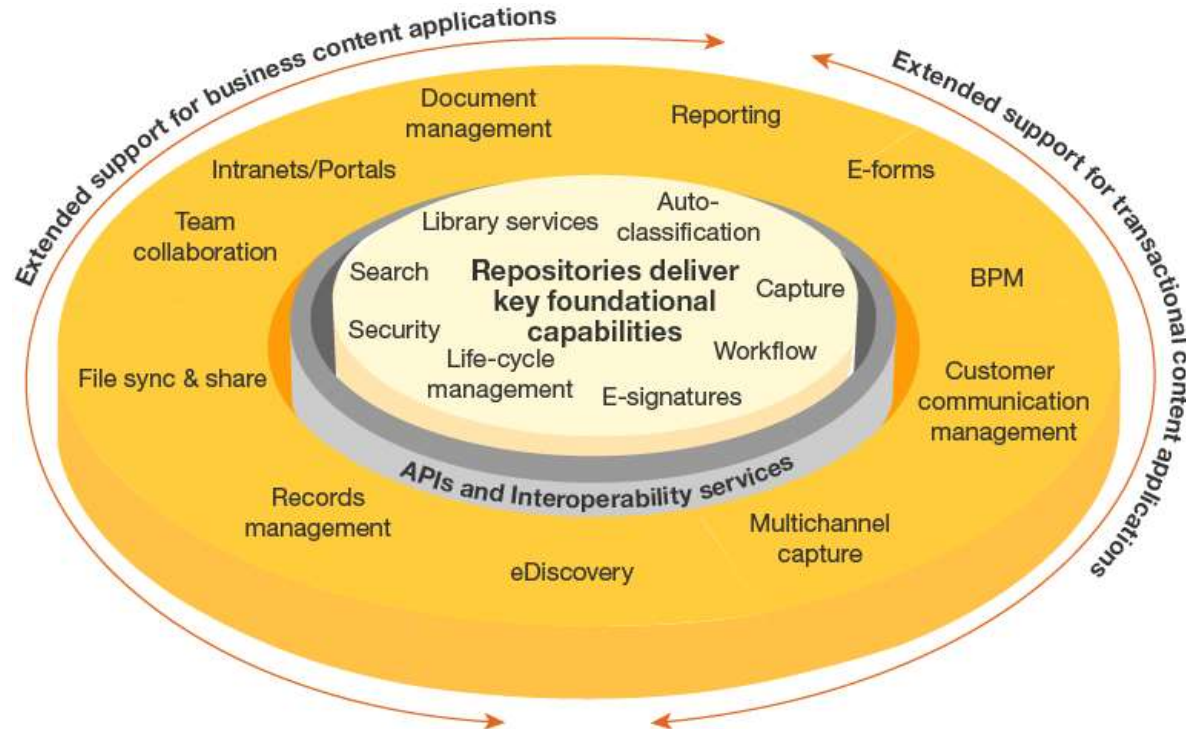
**What does the age of the customer mean for enterprise content management?**



# A new definition for ECM: in the context of business objectives

*“A set of **strategies and technologies** that help information workers **find, use, and analyze digital information**, from any place, at any time, **within the guardrails** of corporate policies.”*

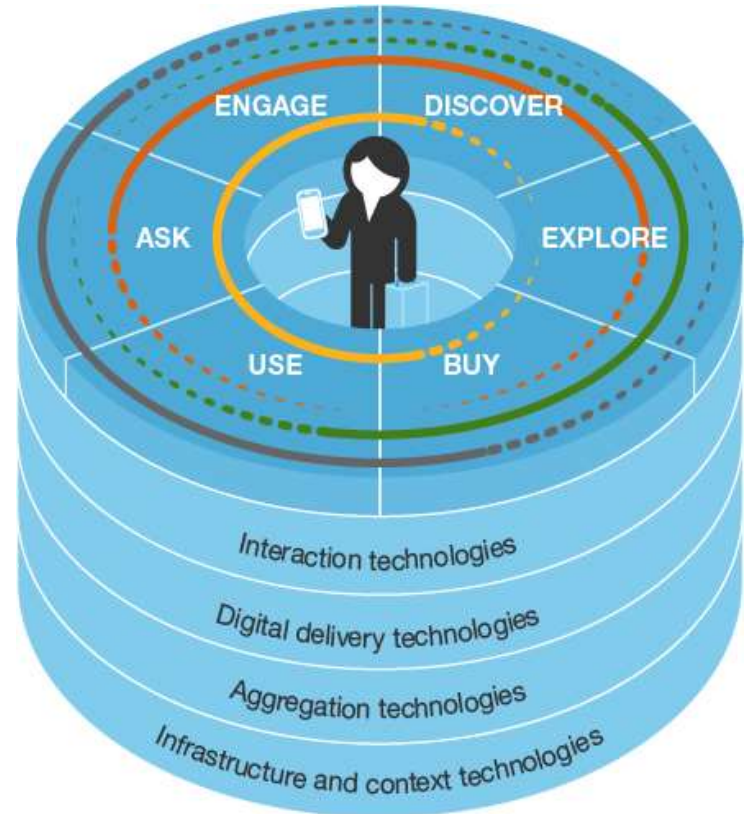
# Recognize business and transactional content serve different needs



› Source: May 12, 2014, "Assess ECM Suites, Platforms, And Point Solutions To Solve Content Challenges" Forrester report

# ECM's role in the business technology agenda

- ▶ Content drives communication with customers.
- ▶ ECM provides the infrastructure and contextual capabilities to support a knowledge-based business.
- ▶ It's a core element to execute on an information governance strategy.



Source: July 29, 2014, "Top Technologies For Your BT Agenda" Forrester report

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**New use cases are shaping the evolution  
of ECM**

# External engagement and content sharing desired by most firms

- ▶ Two-thirds of ECM decision-makers seek external participation
- ▶ Customers and citizens are part of content ecosystems.
- ▶ Enterprises seek the digitization of supply chains

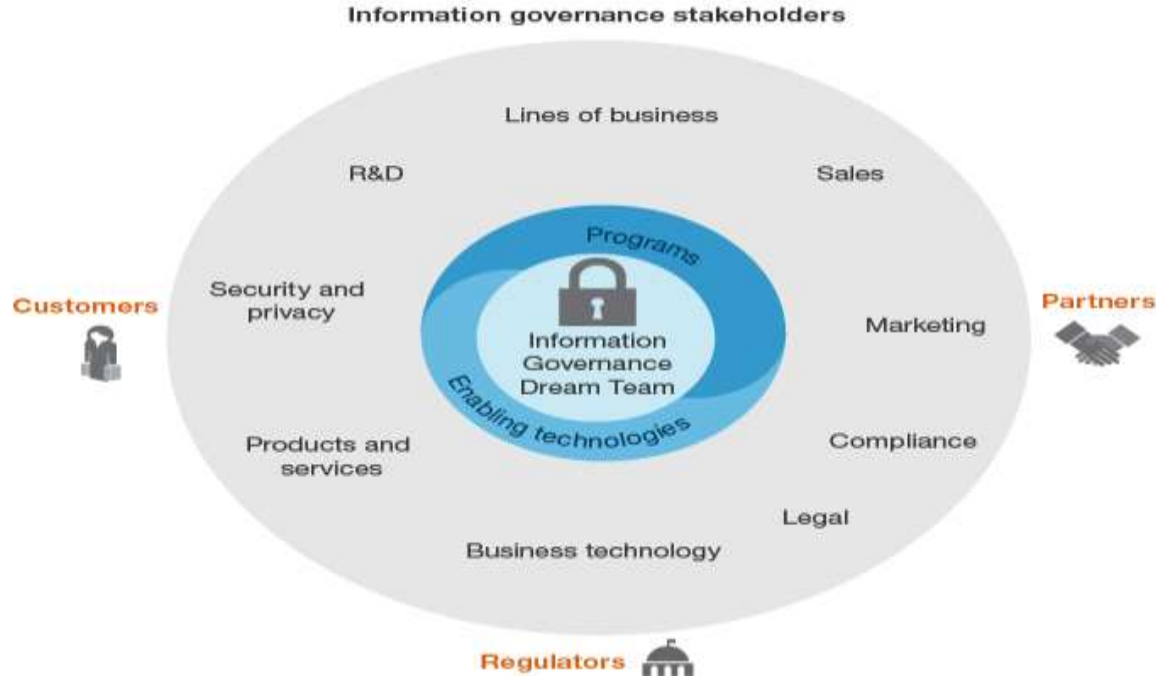


▶ Source: July 2015 ECM Online Global Survey

# External stakeholders need to be reflected in content governance

## Take An Outside-In View Of Information Governance Stakeholders

*Reboot Your Information Governance Program With An Outside-In Perspective*



# Content drives the mobile moment

- ▶ Apps for content access, uploading, and smart processing.
- ▶ Security tops the list of mobile content concerns.
- ▶ Tablets drive engagement with content and customers.

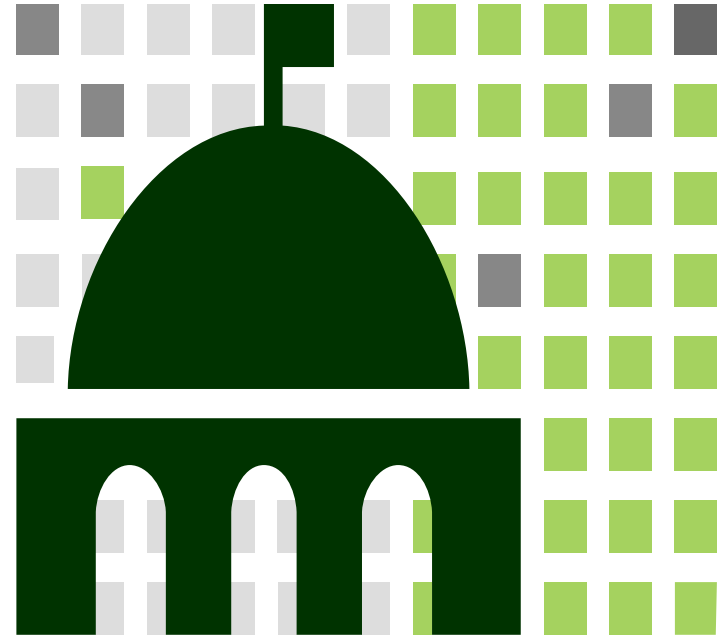


▶ Source: July 2015 ECM Online Global Survey



# Insights are driven by fresh approaches to analytics

- ▶ Insights into adoption patterns and content use.
- ▶ Monitor usage to spot potential risks or violations.
- ▶ Automate categorization and classification.
- ▶ Understand connections between people and content to enrich collaboration.



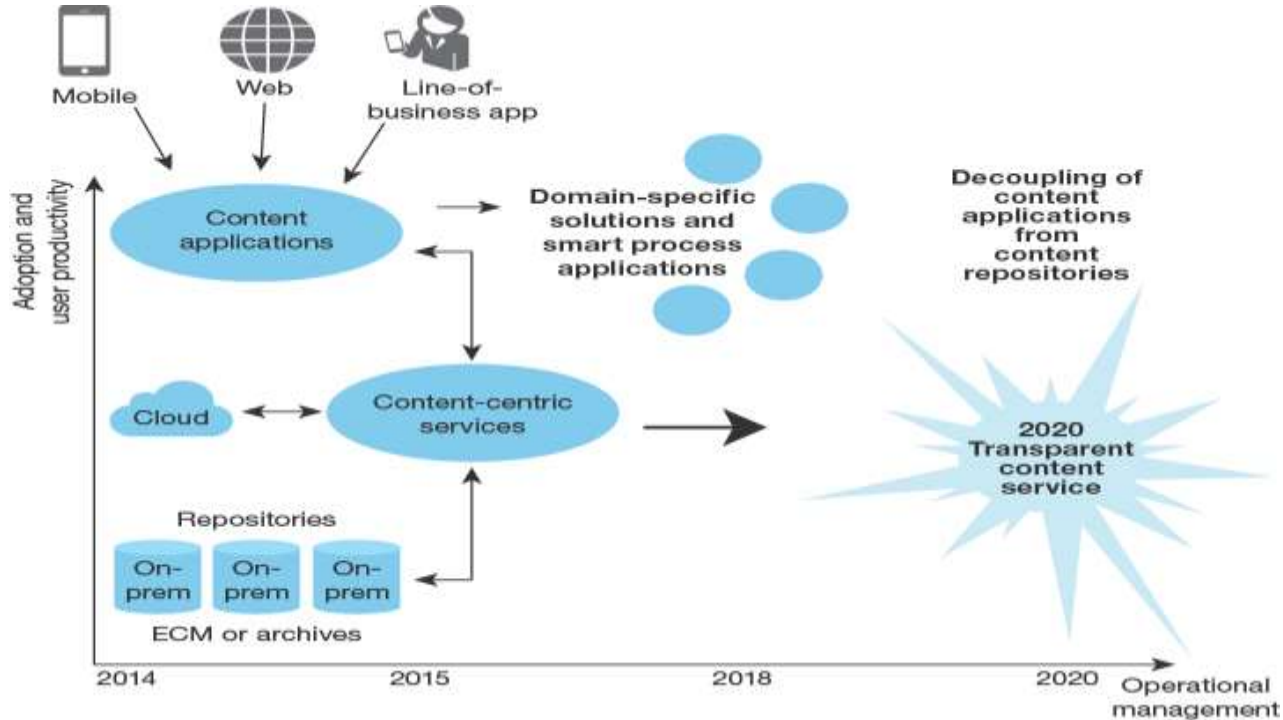
# New skills needed in ECM programs of today

- ▶ User adoption re-emerges as the top challenge facing ECM programs today.
- ▶ Enterprises investing in user experience expertise, designers.



Source: July 2015 ECM Online Global Survey

# Suites to platforms: content services emerge



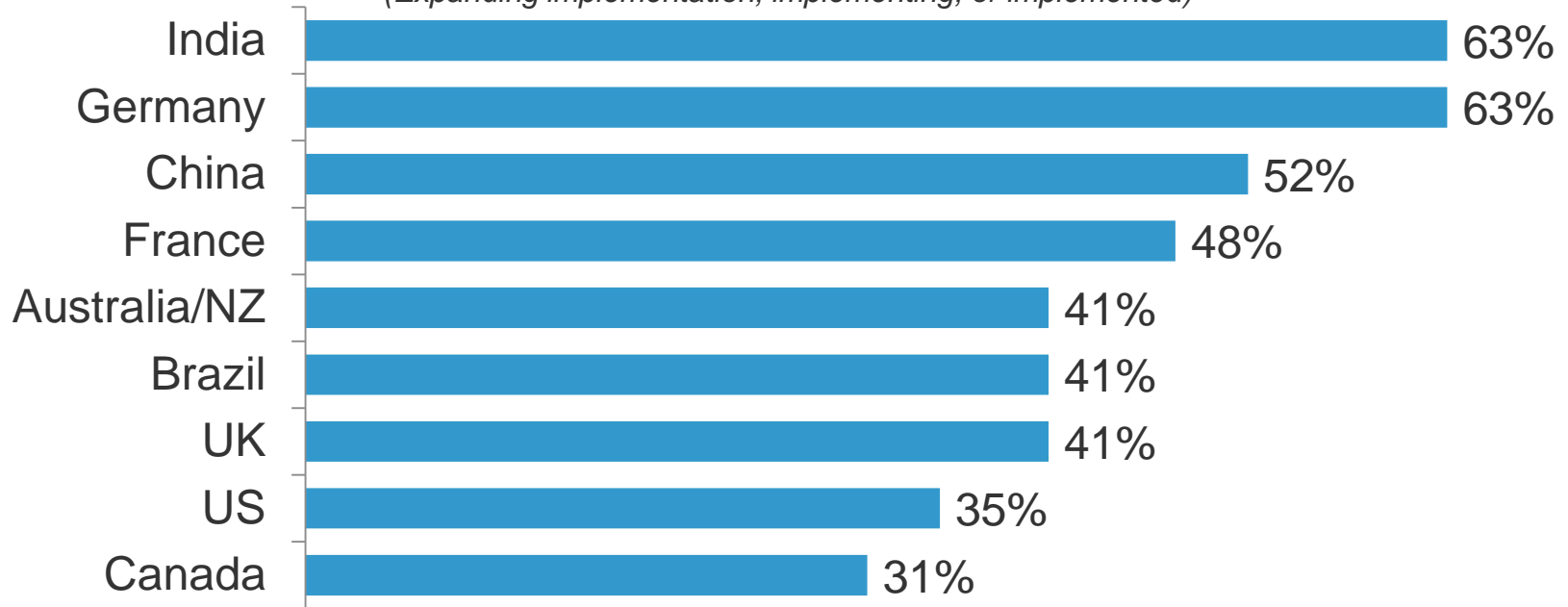
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# India leads globe in empowering the CDO role

*What are your firm's plans for appoint a Chief Data Officer?*

*(Expanding implementation, implementing, or implemented)*

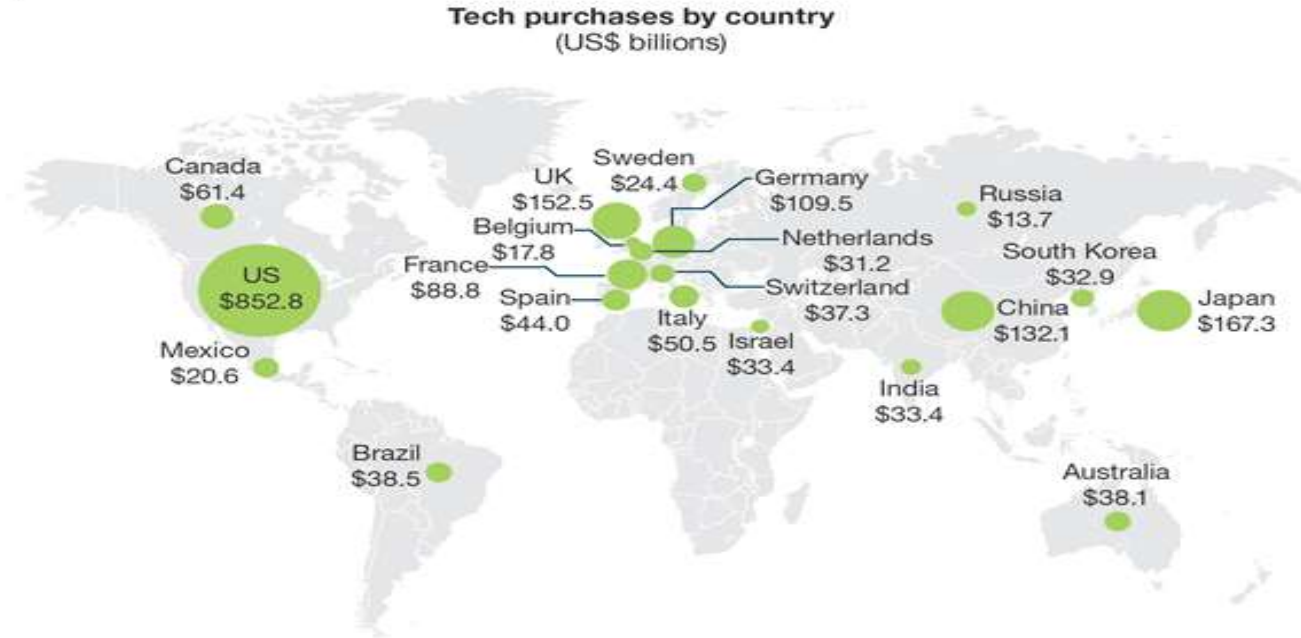


Base: 1054 (US), 127 (Canada), 369 (UK), 299 (France), 316 (Germany), 126 (Brazil), 101 (Australia/NZ), 282 (China), and 331 (India) data and analytics decision-makers

Source: Business Technographics® Global Data & Analytics Survey, 2015

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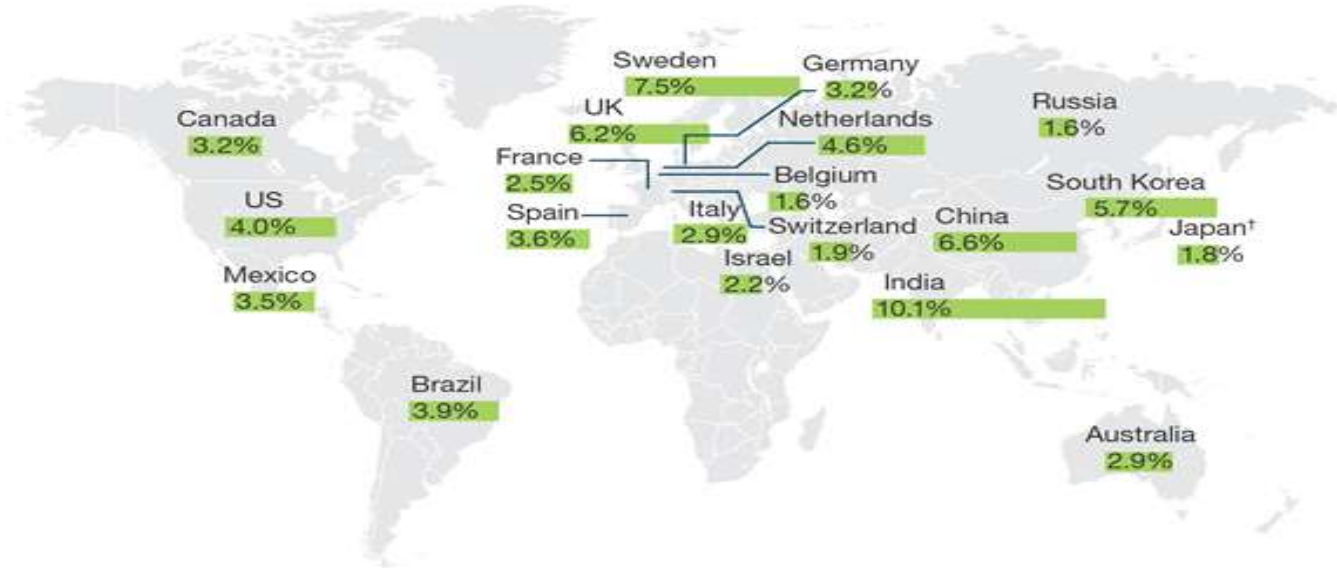
# India is a 33 Billion USD Market



Source: "The Midyear Global Tech Market Outlook For 2015 To 2016" Forrester report

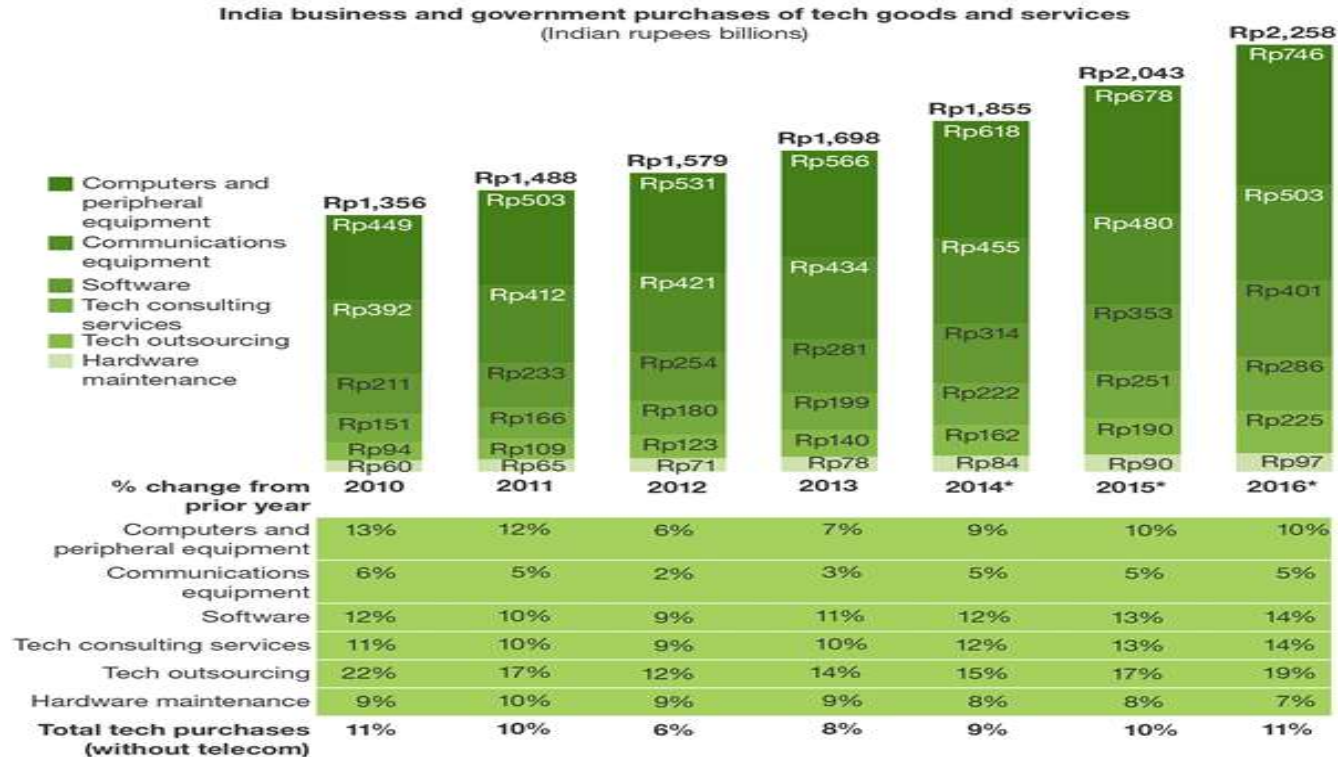
# India is top growth market for tech

Tech purchase growth in 2015 from 2014 in local currencies



Source: "The Midyear Global Tech Market Outlook For 2015 To 2016" Forrester report

# Higher growth in software vs. hardware

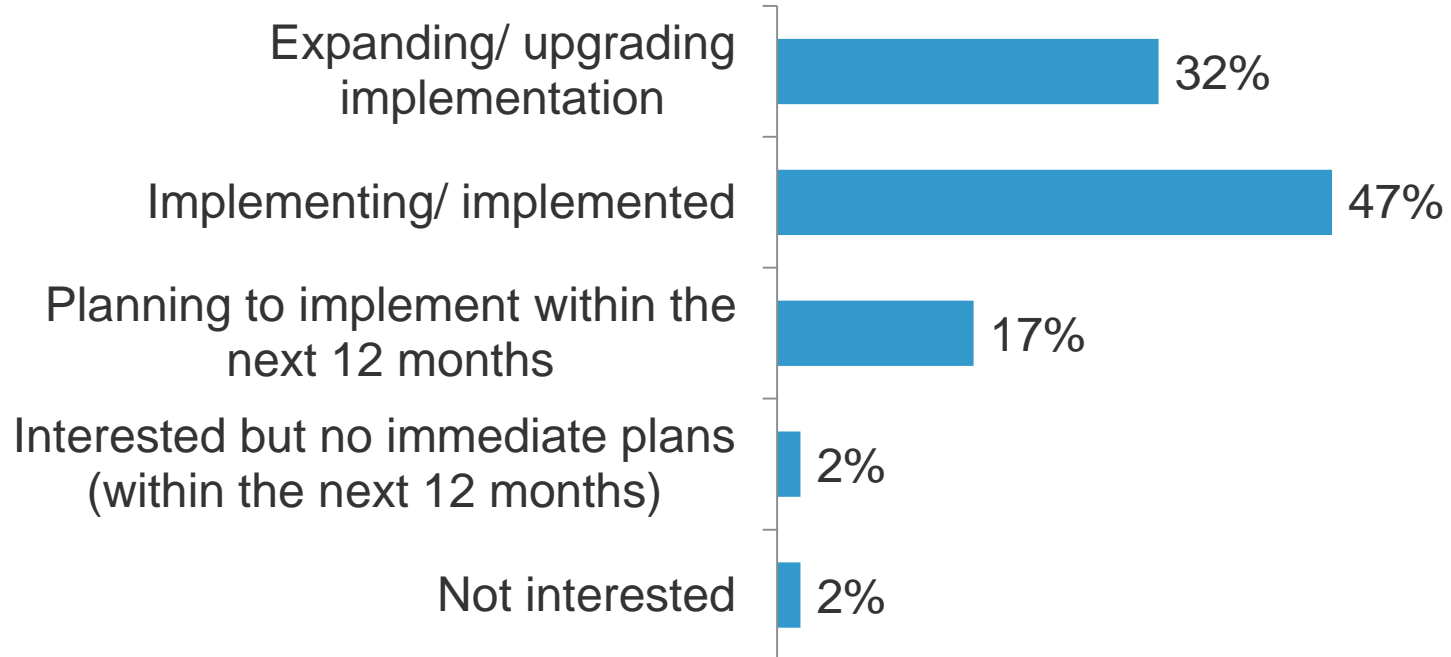


Source: "2015 To 2016 Tech Market Outlook For Leading Asia Pacific Countries" Forrester report



# Firms in India have active ECM roadmaps

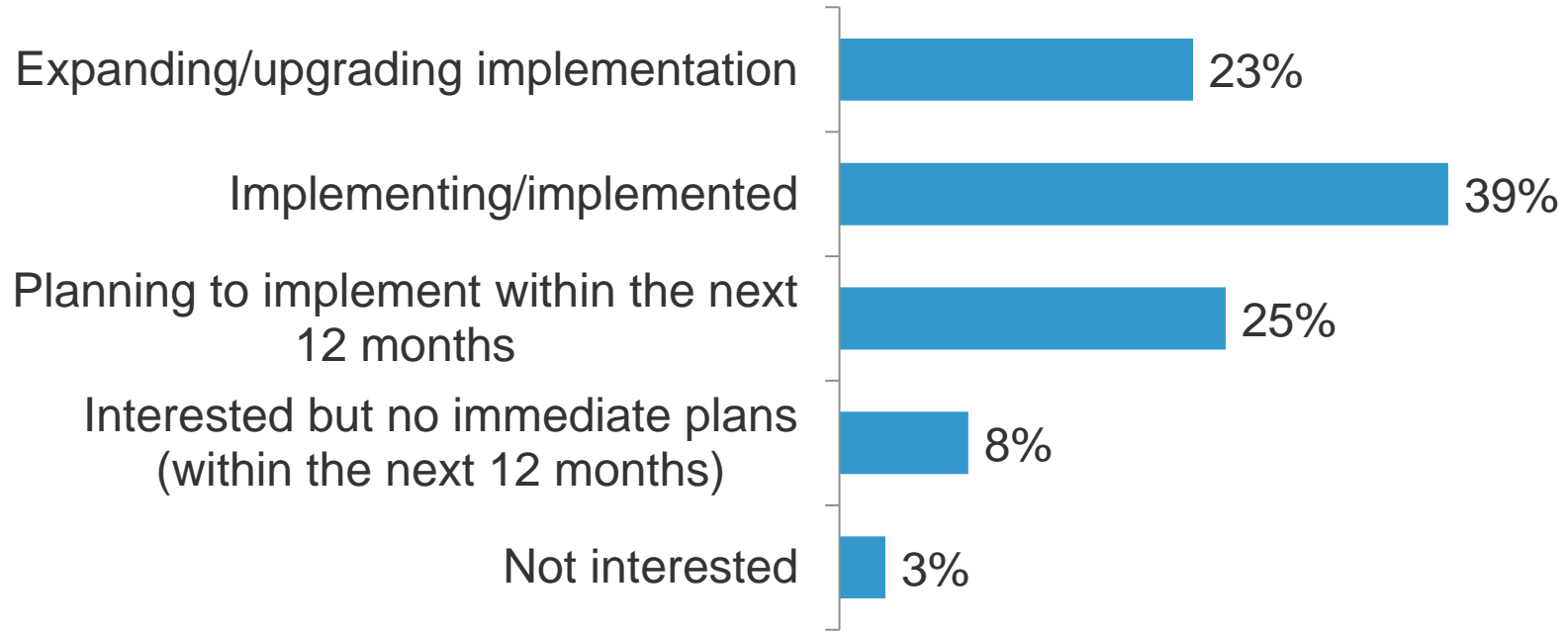
What are your firm's plans to adopt the following email content security and web content security technologies? (Enterprise content management systems)



Base: 102 Indian security decision-makers; Source: Forrester's Global Business Technographics Security Survey, 2015

# Indian firms value unified approaches

What are your firm's plans for the following data driven initiatives? (Combine content management and data management programs into a unified information management program)



Base: 331 Indian data and analytics decision-makers; Source: Forrester's Global Business Technographics Data And Analytics Survey, 2015

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# Thank you



**Cheryl McKinnon**  
**+1 617.613.8806**  
**cmckinnon@forrester.com**

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