A Custom Technology Adoption Profile Commissioned By ASG Technologies | March 2017

Today's Enterprise Content Demands A Modern Approach

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The Enterprise Content Conundrum

Content drives customer communication and underpins essential business processes. Enterprises must not only cope with tremendous volumes of documents but have also had to invest in numerous applications to manage this content. Regulations can be complex, yet users demand simplicity. Information must be protected, but easy mobile access is key to productivity. Companies are struggling to derive value from legacy storage systems, and the shift to cloud services for new applications means a faster pace of change. Access to enterprise content in the context of a business activity is crucial; fresh, modern approaches are now essential.

In February 2017, Forrester Consulting conducted a survey commissioned by ASG Technologies of 220 IT and enterprise architecture and operations decision makers involved with content management at their organizations. The goal of the survey was to examine the approaches enterprises are taking to manage content, the challenges they face, and how their strategies will evolve over the next two years.

One hundred percent of respondents worked in either their organization's IT or enterprise architecture and operations departments.

Regions
› **25%** US
› **16%** Italy
› **16%** Spain
› **15%** UK
› **14%** France
› **14%** Germany

Company size (number of employees)
› **41%** 20,000 or more
› **41%** 5,000 to 19,999
› **18%** 1,000 to 4,999

Business model
› **50%** Both B2B and B2C
› **20%** B2B
› **14%** B2C
› **16%** B2B2C

Job level
› **25%** C-level executive
› **11%** Vice president
› **29%** Director
› **35%** Manager

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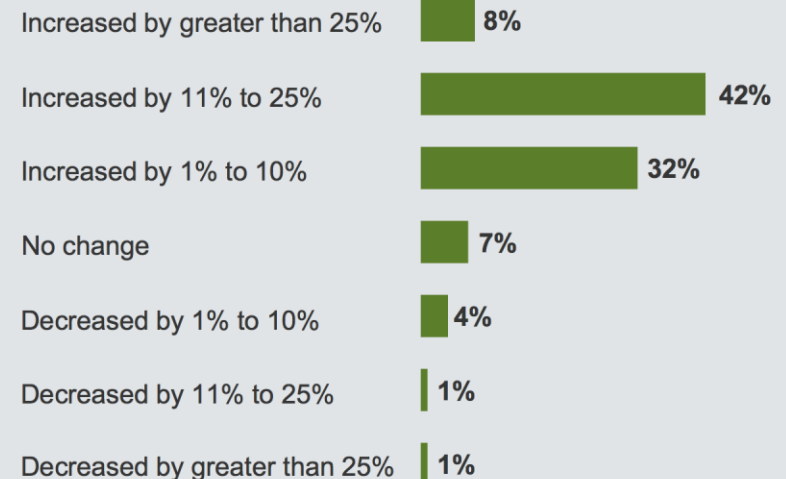**OVERVIEW**   **SITUATION**   **APPROACH**   **OPPORTUNITY**   **CONCLUSIONS**

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Enterprises Are Generating And Receiving More And More Content

Enterprises recognize the need to serve empowered customers and improve these customers' experiences. In this age of the customer, it is critical that organizations extract and use the information contained in documents and records for competitive advantage and customer engagement. But for many firms, keeping up with the volume and complexity of content is a significant struggle. Enterprises are coping with tremendous volumes of unstructured data in the form of business content, like office documents, presentations, spreadsheets, and rich media. They also have a great deal of transactional content originating from outside the organization, like applications, claims, contracts, and forms. The majority of organizations (60%) are storing 100 terabytes (TBs) or more of unstructured data; nearly one-quarter (23%) have 1 petabyte (PB) or more of data. Further, the amount of data these organizations are tasked with storing has increased significantly over the past two years: 82% of those surveyed reported an increase in the amount of unstructured data stored; 50% said the volume has increased by greater than 10% over the past 24 months.

"Unstructured data" is defined as content that does not have a formal data model or sits outside of a database application.

"How has the volume of unstructured data stored by your organization changed over the past 24 months?"

Increased by greater than 25%	8%
Increased by 11% to 25%	42%
Increased by 1% to 10%	32%
No change	7%
Decreased by 1% to 10%	4%
Decreased by 11% to 25%	1%
Decreased by greater than 25%	1%

Base: 220 IT and enterprise architecture and operations decision makers involved with content management
("don't know" responses not shown)
Source: A commissioned study conducted by Forrester Consulting on behalf of ASG Technologies, February 2017

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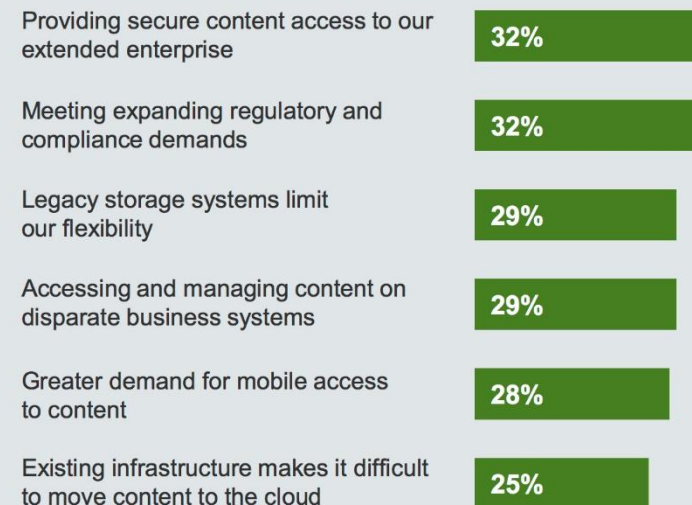**OVERVIEW**   **SITUATION**   **APPROACH**   **OPPORTUNITY**   **CONCLUSIONS**

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Top Content Management Challenges

It is essential that content applications connect people with the information needed to make decisions and collaborate with customers and colleagues. But organizations face numerous challenges, including:

› **Regulatory and security requirements.** Sharing content with external parties is becoming the norm. But with that comes expanding regulatory and compliance demands and an increased urgency to protect both customer and enterprise data, which are issues cited by nearly one-third of respondents.

› **Demand for mobile accessibility.** Enterprises need to serve users — whether employees, customers, or partners — in the moment. This means making content available via mobile and not just traditional channels. But meeting the demand for mobile accessibility is a top challenge for over one-quarter of organizations.

› **Limitations of legacy systems.** Nearly three out of 10 IT and enterprise architecture and operations professionals surveyed reported that they are challenged by legacy storage or disconnected content management systems. Twenty-five percent said their ability to move content to the cloud is hampered by their existing infrastructure.

"What are the top content management challenges your organization faces?"
(Select up to five; top responses shown)

Challenge	Percent
Providing secure content access to our extended enterprise	32%
Meeting expanding regulatory and compliance demands	32%
Legacy storage systems limit our flexibility	29%
Accessing and managing content on disparate business systems	29%
Greater demand for mobile access to content	28%
Existing infrastructure makes it difficult to move content to the cloud	25%

Base: 220 IT and enterprise architecture and operations decision makers involved with content management
Source: A commissioned study conducted by Forrester Consulting on behalf of ASG Technologies, February 2017

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Enterprises Are Investing In Numerous Systems To Manage Content

Few organizations have standardized on a single solution to manage enterprise content: Ninety-five percent of those surveyed said they were using more than one system, including 31% using five or more systems. Tools used to manage content range from traditional applications to more flexible, collaborative apps and services. While the majority of organizations are using enterprise content management (ECM) (52%) and enterprise applications (56%), many are turning to document collaboration apps (41%) and enterprise file sync and share tools (40%).

Many enterprises have installed ECM solutions tactically, resulting in the need to maintain many dissimilar but overlapping platforms.

"How many different systems is your organization using to manage your content?"

5%

- ■ One
- ■ Two to four
- ■ Five or more

31%

64%

Base: 204 IT and enterprise architecture and operations decision makers involved with content management familiar with the number of systems used to manage content
Source: A commissioned study conducted by Forrester Consulting on behalf of ASG Technologies, February 2017

"What types of applications are being used to manage your organization's content?" (Select all that apply)

Enterprise apps	56%
Enterprise content management	52%
File shares	43%
In-house-developed apps	41%
Document collaboration apps	41%
Enterprise file sync and share	40%
Archiving platforms	38%

Base: 220 IT and enterprise architecture and operations decision makers involved with content management
Source: A commissioned study conducted by Forrester Consulting on behalf of ASG Technologies, February 2017

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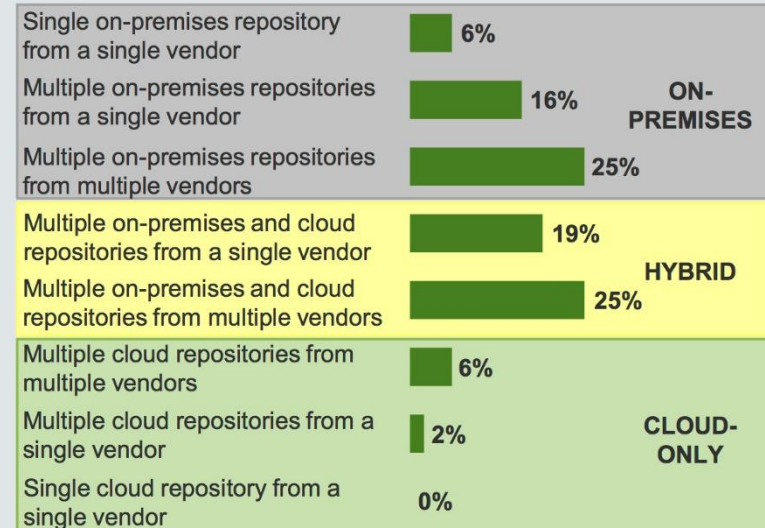## Content Is Housed In Multiple Repositories

Organizations are using multiple repositories to store content, yet many are limiting their flexibility with an on-premises-only approach. While 93% of companies are using multiple repositories to store content, 47% are limiting content storage to on-premises repositories. Others, however, are tapping into cloud services, with 44% using a hybrid approach — both on-premises and cloud repositories — and 8% storing all content in the cloud. And for many (56%) these repositories are from multiple vendors.

While Forrester's research has consistently shown that enterprises desire standardization on a single ECM solution, the reality is that multiple repositories from multiple vendors are the norm.[1] Organizations need to think about managing content where it is most useful to users — a challenge that is not likely to be solved with a single repository.

Ninety-three percent of organizations use multiple repositories to store enterprise content.

"What approach is your organization taking to store content?"

Single on-premises repository from a single vendor	6%	ON-PREMISES
Multiple on-premises repositories from a single vendor	16%	
Multiple on-premises repositories from multiple vendors	25%	
Multiple on-premises and cloud repositories from a single vendor	19%	HYBRID
Multiple on-premises and cloud repositories from multiple vendors	25%	
Multiple cloud repositories from multiple vendors	6%	CLOUD-ONLY
Multiple cloud repositories from a single vendor	2%	
Single cloud repository from a single vendor	0%	

Base: 220 IT and enterprise architecture and operations decision makers involved with content management
("don't know" responses not shown)
Source: A commissioned study conducted by Forrester Consulting on behalf of ASG Technologies, February 2017

[1] Source: "Prepare For The Post-Repository World Of Intelligent Content Services: ECM In 2021," Forrester Research, Inc., February 7, 2017
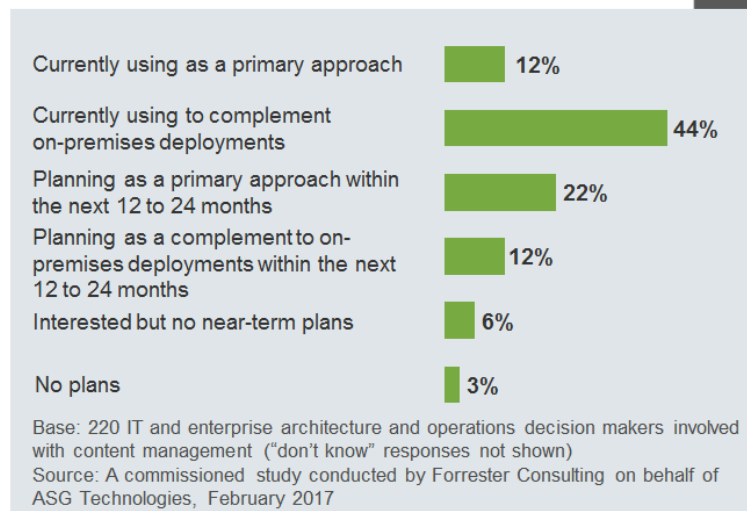
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Enterprises Will Embrace Cloud Services For Content Management

The next two years will be a transition period for enterprise content management deployment methods, as more enterprises move to a more flexible, cloud-based approach. While 56% of organizations use cloud-based content management systems today — either as a primary approach (12%) or to complement on-premises deployments (44%) — 34% plan to move to a cloud-only (22%) or hybrid (12%) approach over the next 12 to 24 months.

The heavy-footprint, assembled-via-acquisition, architected-for-on-premises suites will give way to newer architectures, flexible platforms, and cloud-native alternatives.

Currently using as a primary approach	12%
Currently using to complement on-premises deployments	44%
Planning as a primary approach within the next 12 to 24 months	22%
Planning as a complement to on-premises deployments within the next 12 to 24 months	12%
Interested but no near-term plans	6%
No plans	3%

"What are your organization's plans to move its content management systems to a cloud environment?"

Base: 220 IT and enterprise architecture and operations decision makers involved with content management ("don't know" responses not shown)
Source: A commissioned study conducted by Forrester Consulting on behalf of ASG Technologies, February 2017

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A Modern Approach Eases Content Management Woes

The monolithic ECM suites that have been pervasive in enterprises for decades are giving way to modern — often cloud-based — content platforms. This new approach to content management can enable businesses to easily access and integrate content from any device, anywhere. When asked to identify the extent to which certain capabilities would improve their ability to manage content, respondents identified considerable opportunity for improvement:

› **Visibility across disparate systems.** Eighty-six percent indicated having a single-system view of content across multiple, disparate repositories, databases, and file systems would moderately or significantly improve their ability to manage content.

› **Anytime, anywhere access.** Users are demanding access to content when and where they need it. The ability to provide this level of access is seen as a considerable improvement by 85% of those surveyed.

› **Freedom to use every platform.** Too many enterprises are still using an on-premises-only approach to store content, with existing infrastructure limiting their ability to move to the cloud. The ability to store content in public, private, or hybrid environments is seen as a plus for 84% of respondents.

"To what degree have or would the following capabilities improve your organization's ability to manage content?" (Percentage moderate or significant improvement)

Capability	Percentage
Single-system view of content across multiple, disparate repositories, databases, and file systems	86%
Ability for users to access content anywhere, from any device	85%
Flexibility to store content in public, private, and hybrid environments	84%
Ability to manage any content type, regardless of size or origin	84%
Federated life-cycle management	82%
Automated, rules-based full and partial redaction to protect sensitive information	81%
Encryption of content at rest	75%

Base: 220 IT and enterprise architecture and operations decision makers involved with content management
Source: A commissioned study conducted by Forrester Consulting on behalf of ASG Technologies, February 2017

Conclusions

Enterprises rely on trusted information to make better decisions and serve their customers. The challenge, however, has been the proliferation of numerous content systems, leading to disjointed, hard-to-access approaches to information retrieval and use. The pace of business continues to accelerate. Technology leaders are seeking tools and approaches that help them access, view, and use content from a single app, regardless of location. As cloud content services become pervasive, enterprises must still cope with the massive content stores that remain on-premises. Technology that helps bridge the increasingly hybrid world of content management is an opportunity for 90% of the enterprises surveyed for this research.

METHODOLOGY

› This Technology Adoption Profile was commissioned by ASG Technologies.

› To create this profile, Forrester conducted a custom survey of 220 technology management and enterprise architecture and operations decision makers involved with content management at organizations with 1,000 or more employees.

› The custom survey was conducted in February 2017.

ABOUT FORRESTER CONSULTING

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Within the next two years, 90% of organizations will be using cloud-based content management systems, either as a primary or hybrid approach.

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