

**making the case for
document management
in challenging times**

about the survey

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*Making the Case for Document
Management in Challenging Times*

about the sample

more than 10 employees

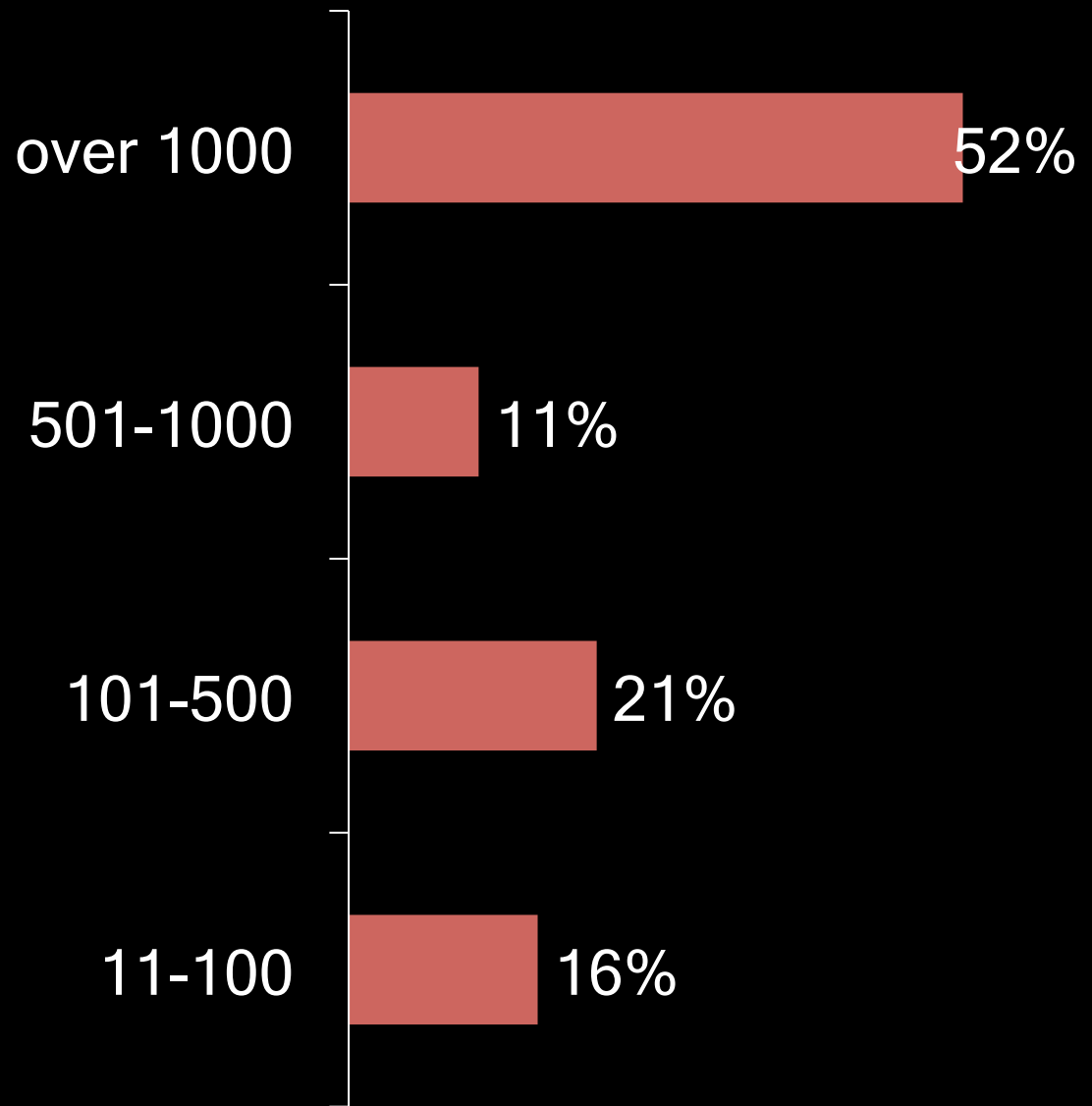
not connected with AIIM

US companies

who was surveyed? - those who “order,
recommend, approve or initiate
computer hardware or software
decisions”

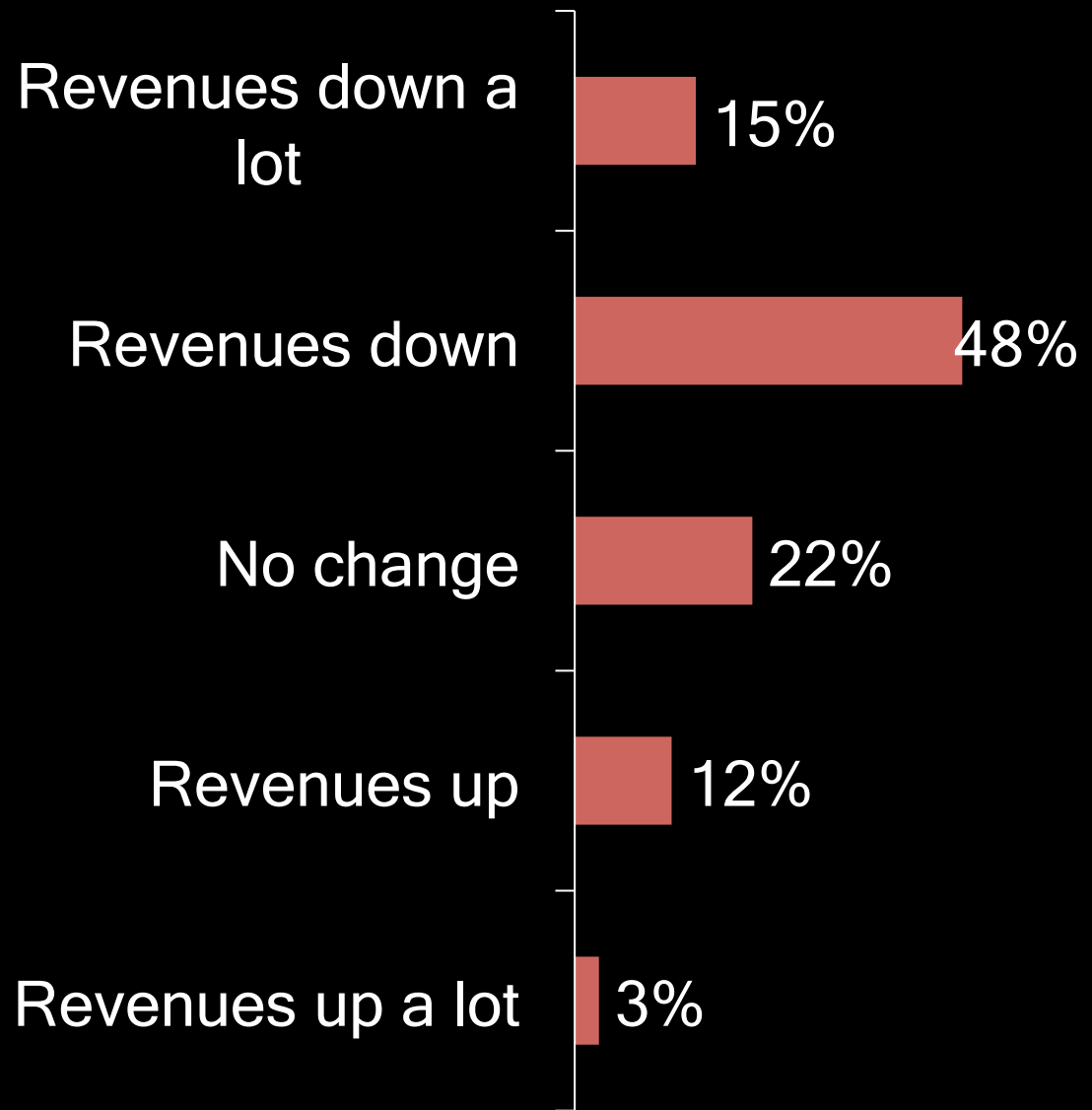
conducted first week of February 2009

How many people are employed by your organization?



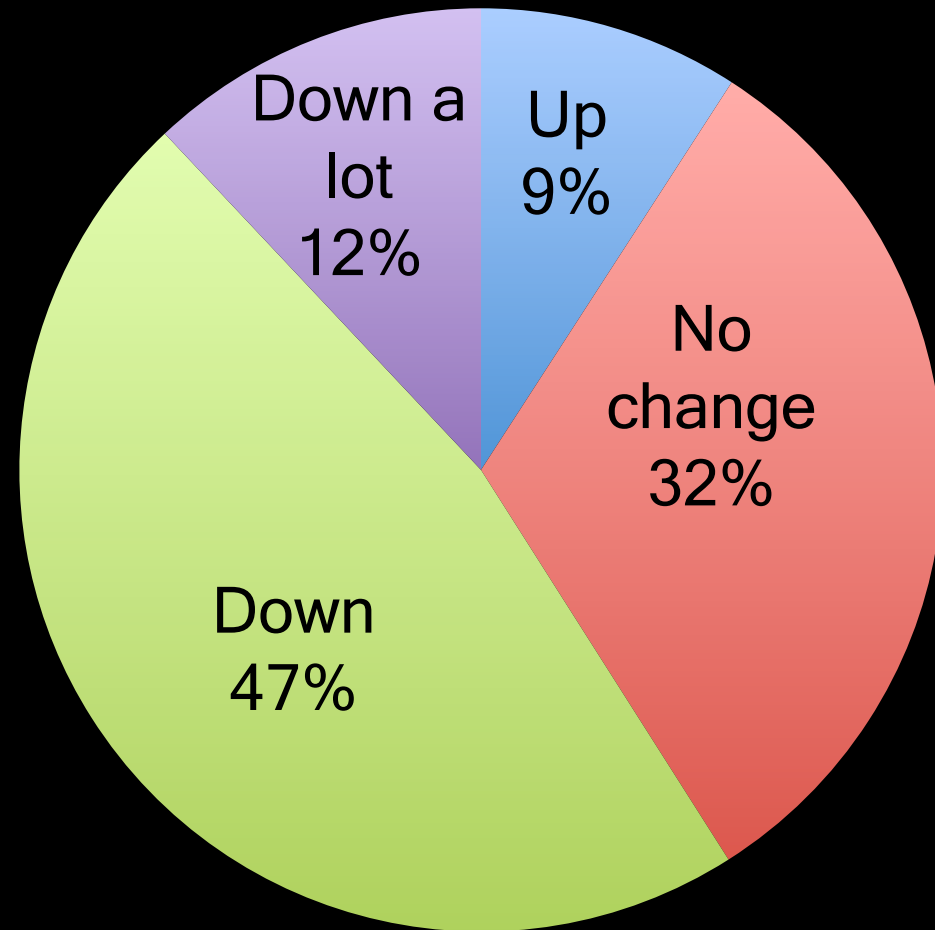
**the current economic
situation**

How has the current state of the economy affected the revenues of your organization?



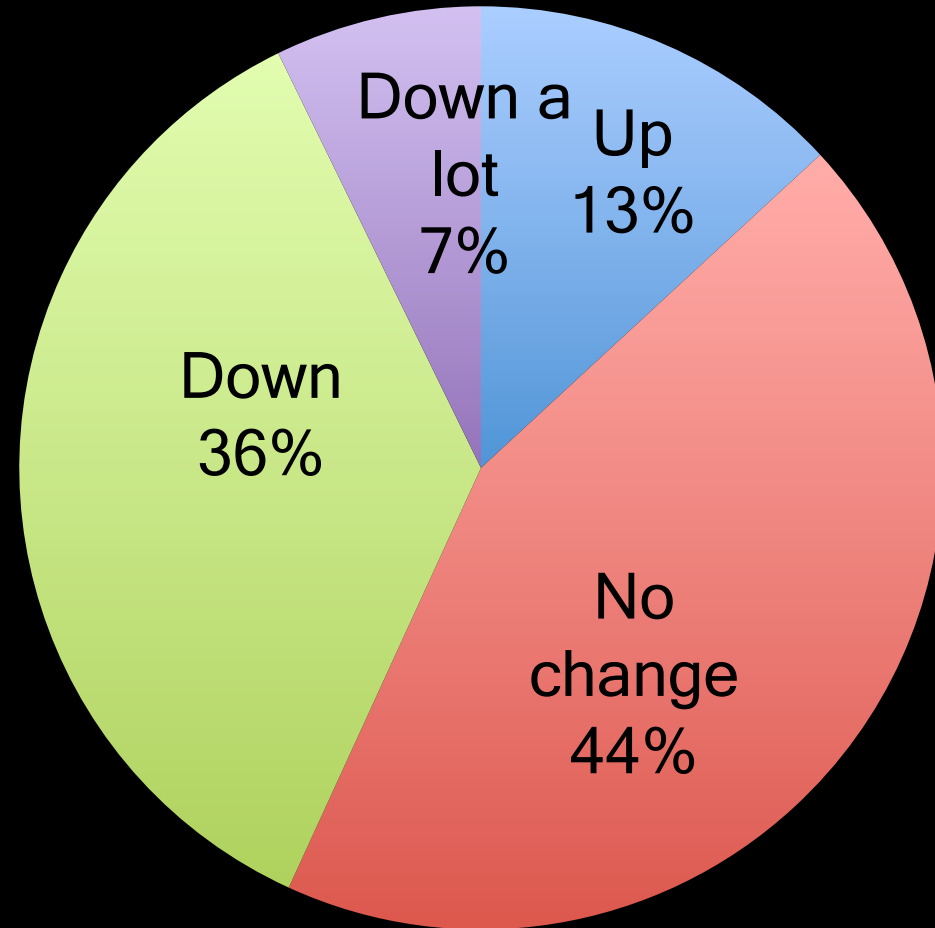
How has your spending on each of the following changed as a result of current economic conditions?

Headcount



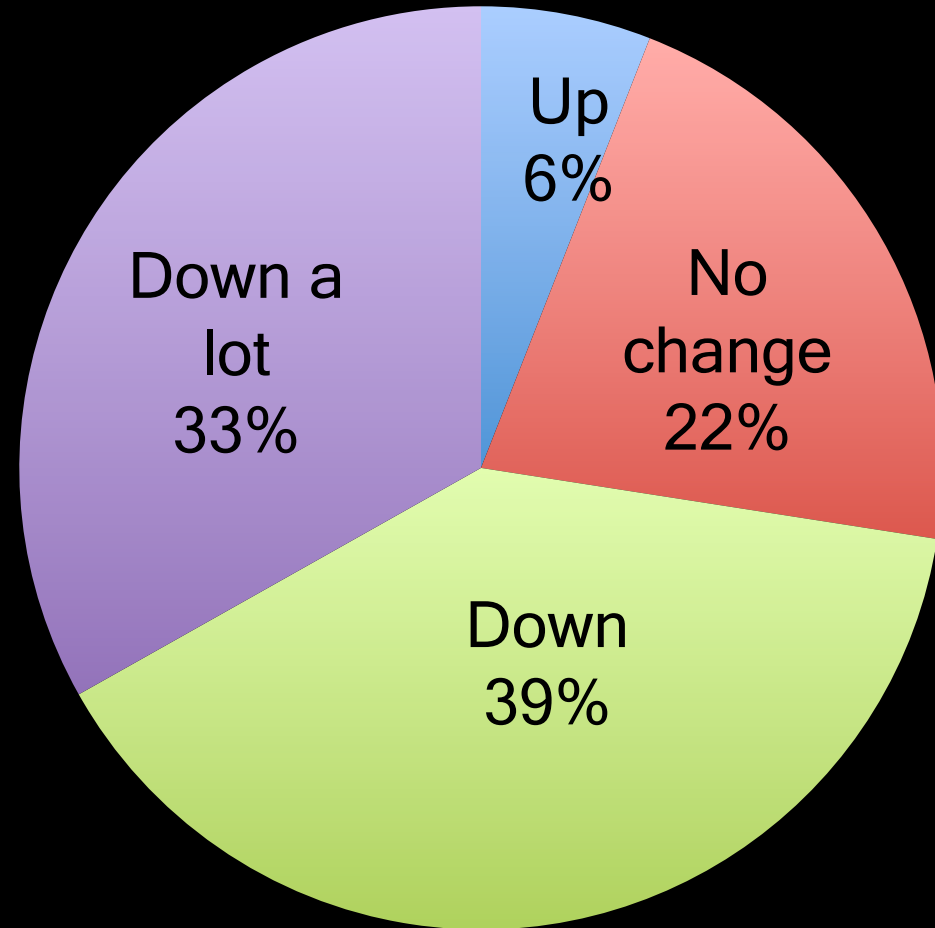
Marketing

How has your spending on each of the following changed as a result of current economic conditions?



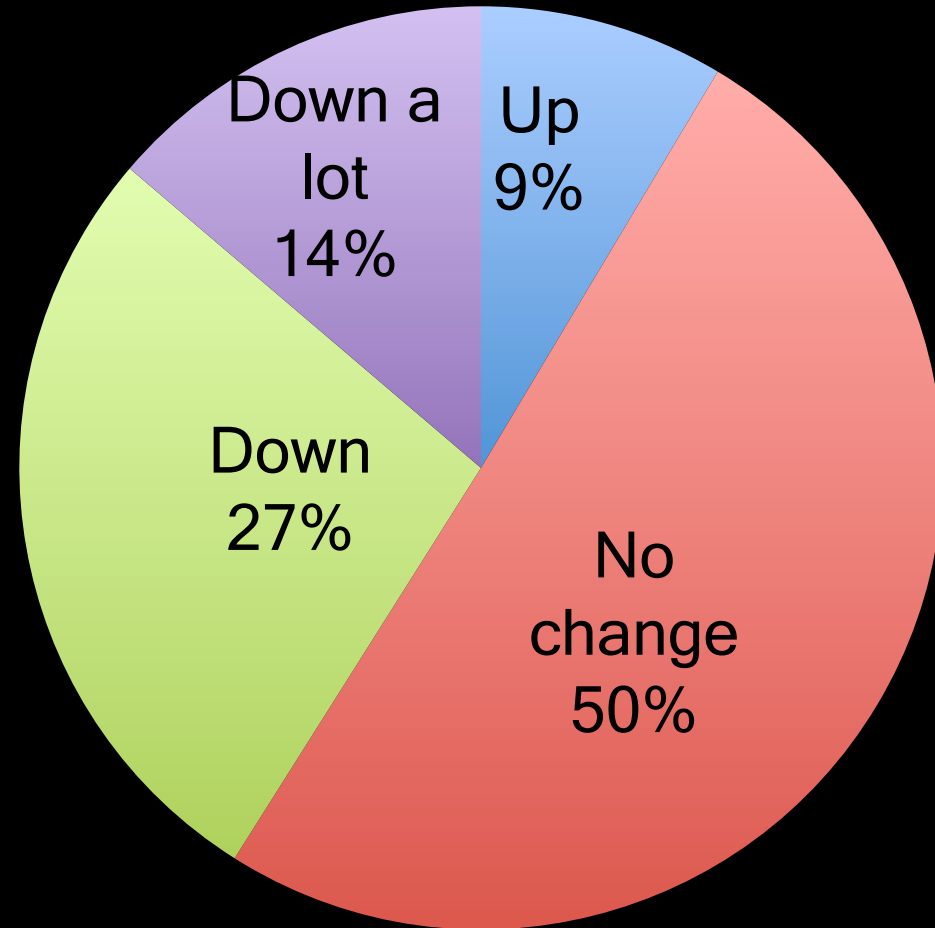
Travel & Entertainment

How has your spending on each of the following changed as a result of current economic conditions?



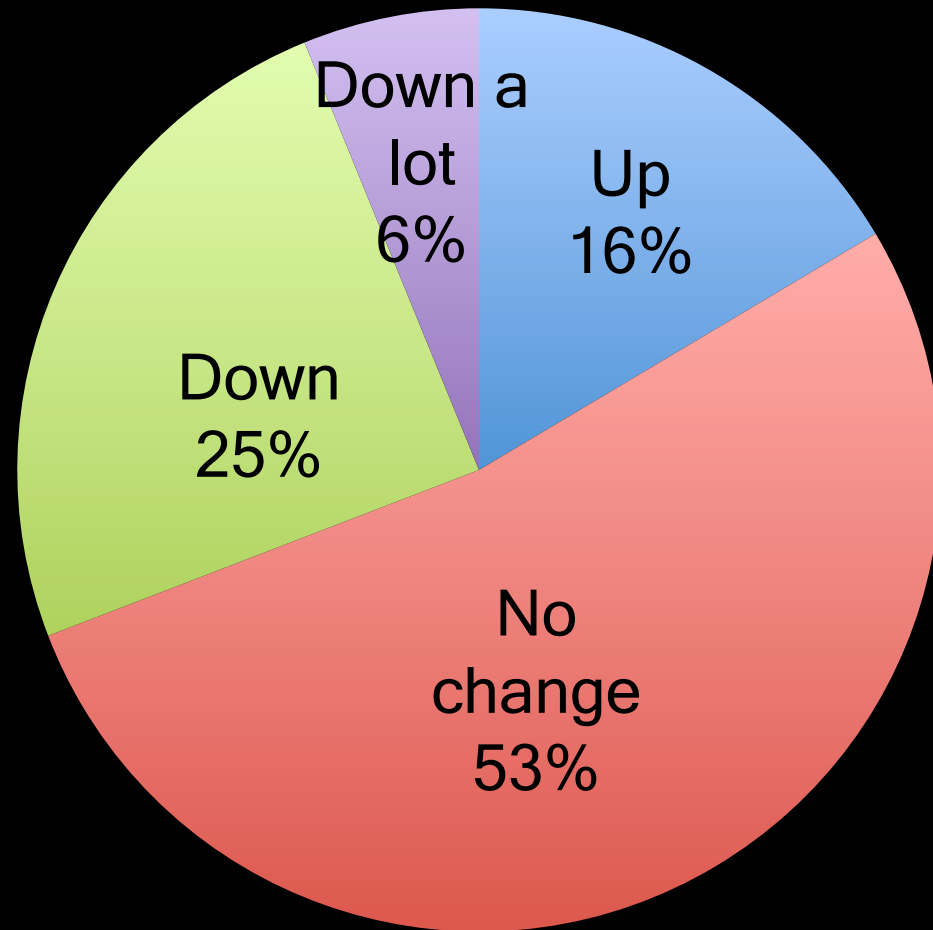
Staff training

How has your spending on each of the following changed as a result of current economic conditions?



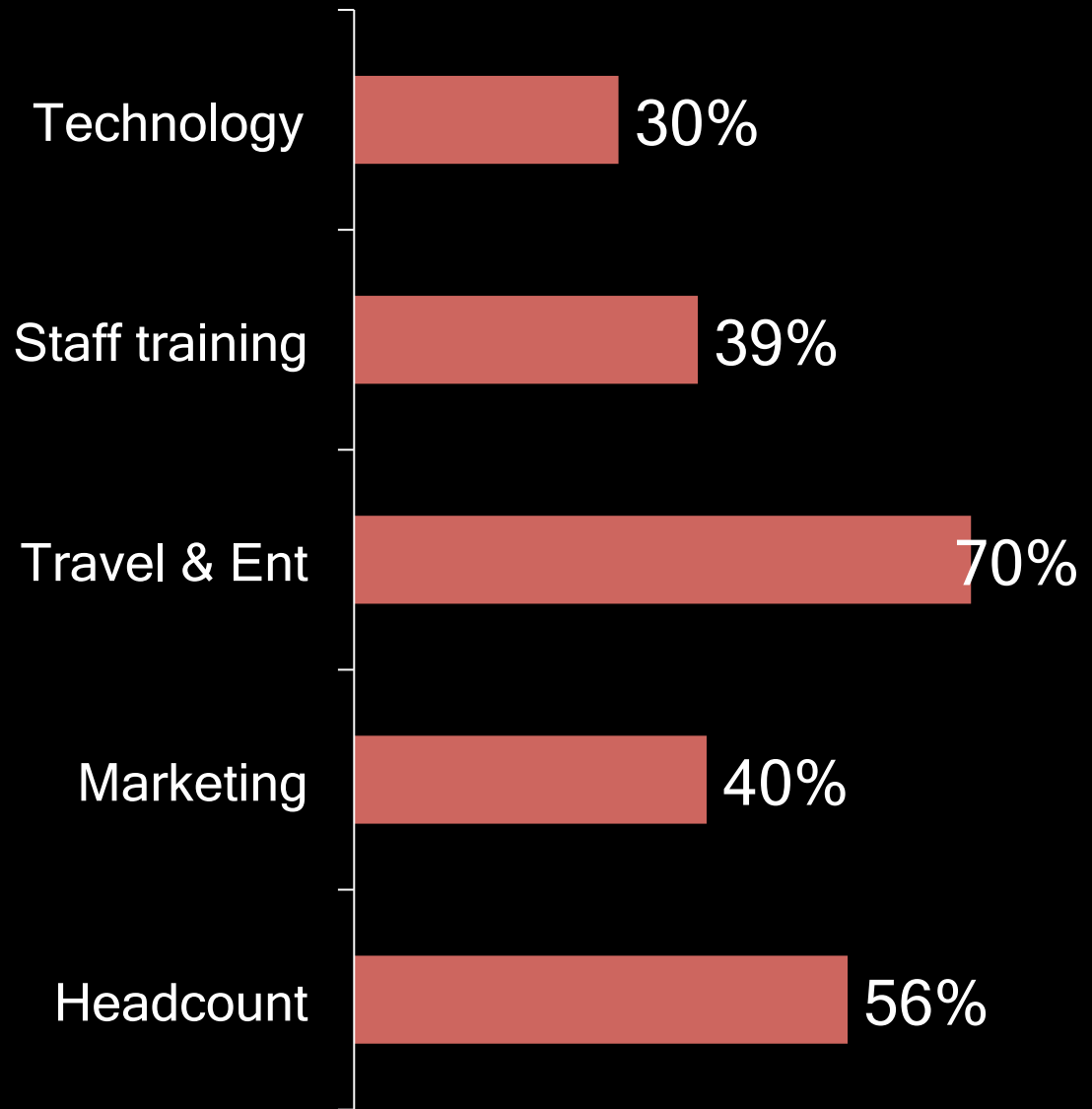
Technology

How has your spending on each of the following changed as a result of current economic conditions?



How has your spending on each of the following changed as a result of current economic conditions?

“Down” plus
“down a lot”



How long do you think the current economic downturn will last?

34%



I expect things to start to get better by the end of 2009

45%



I think that the slowdown will impact our business through 2010

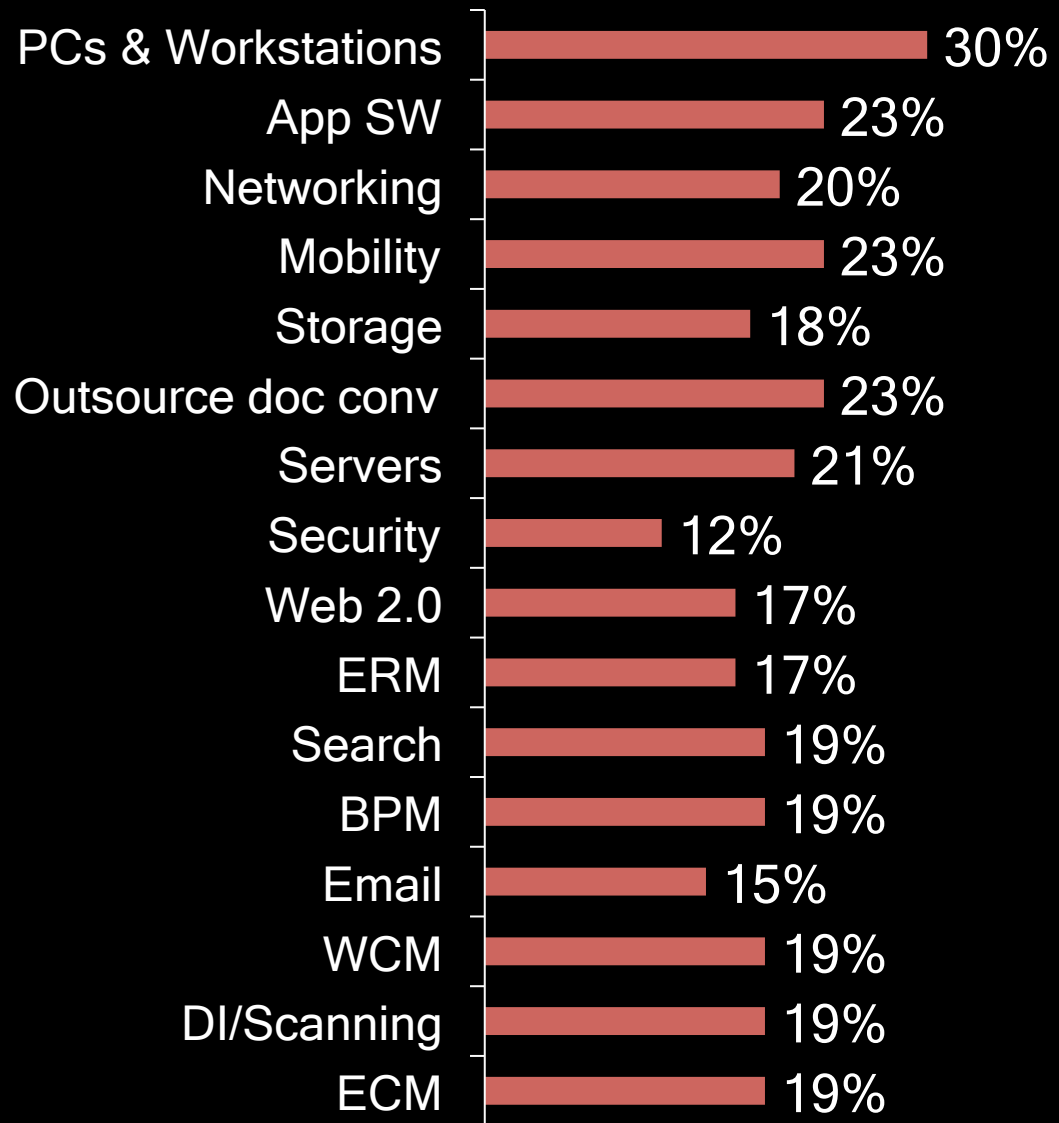
21%



I believe that the downturn will last for several years

Spending
“down” or
“down a lot”
over past three
months

Those with an
opinion



key findings

overall, pessimistic about current
economic climate

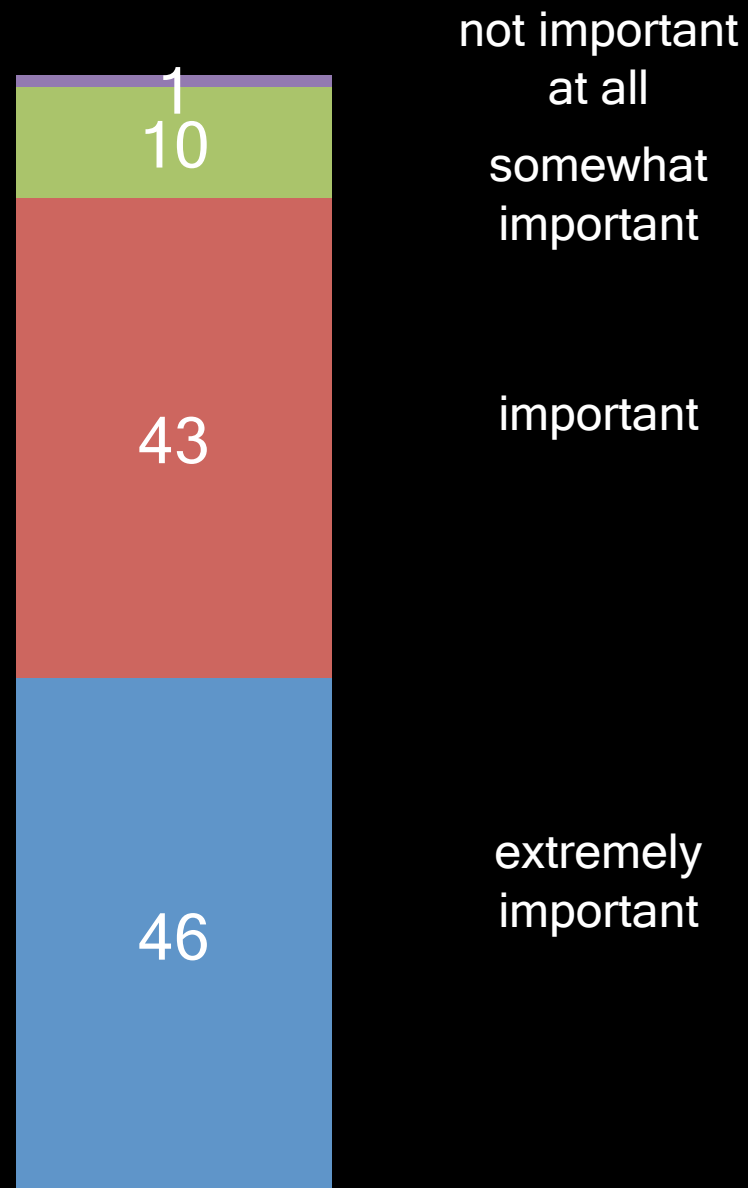
62% have seen revenue declines

2/3 see downturn lasting beyond this
year - 21% for “several years”

larger companies most pessimistic in
sample

making the case for DM

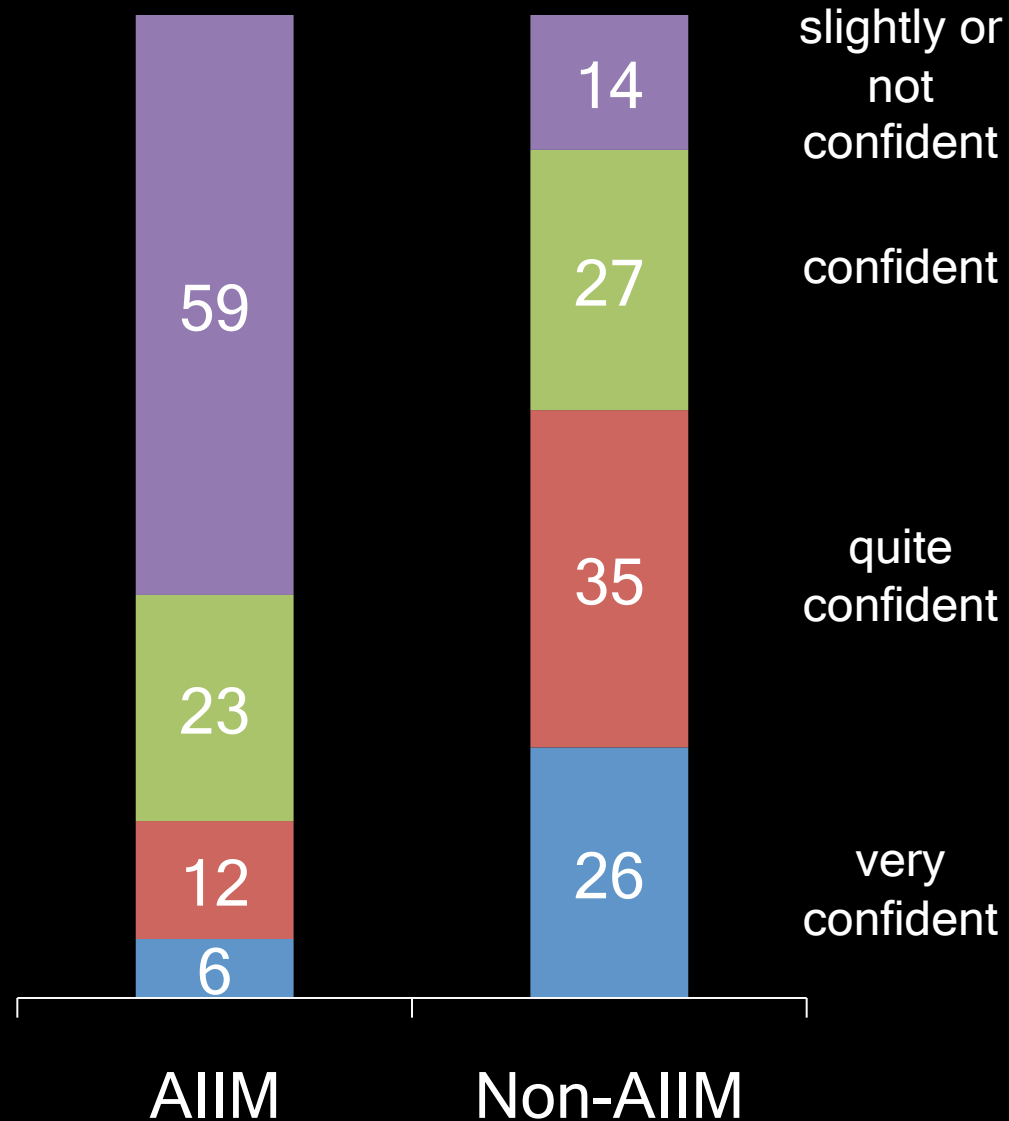
How important is the effective management of electronic information to the long-term success of your organization?



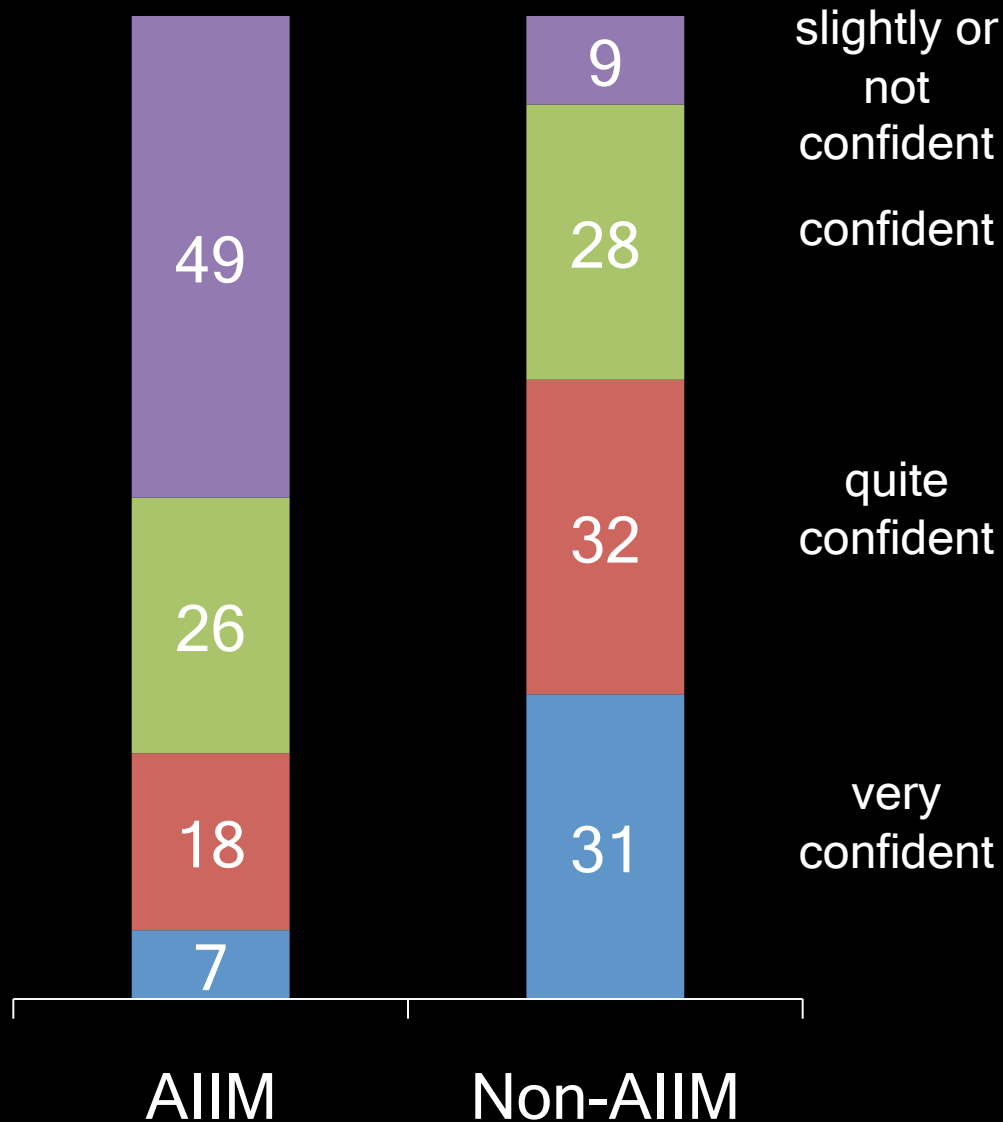
comparing data from current sample
unconnected with AIIM with similar
demographic sample of 300 end users
connected with AIIM (from our 2008
“State of the Industry” survey

(note: primarily a private sector sample)

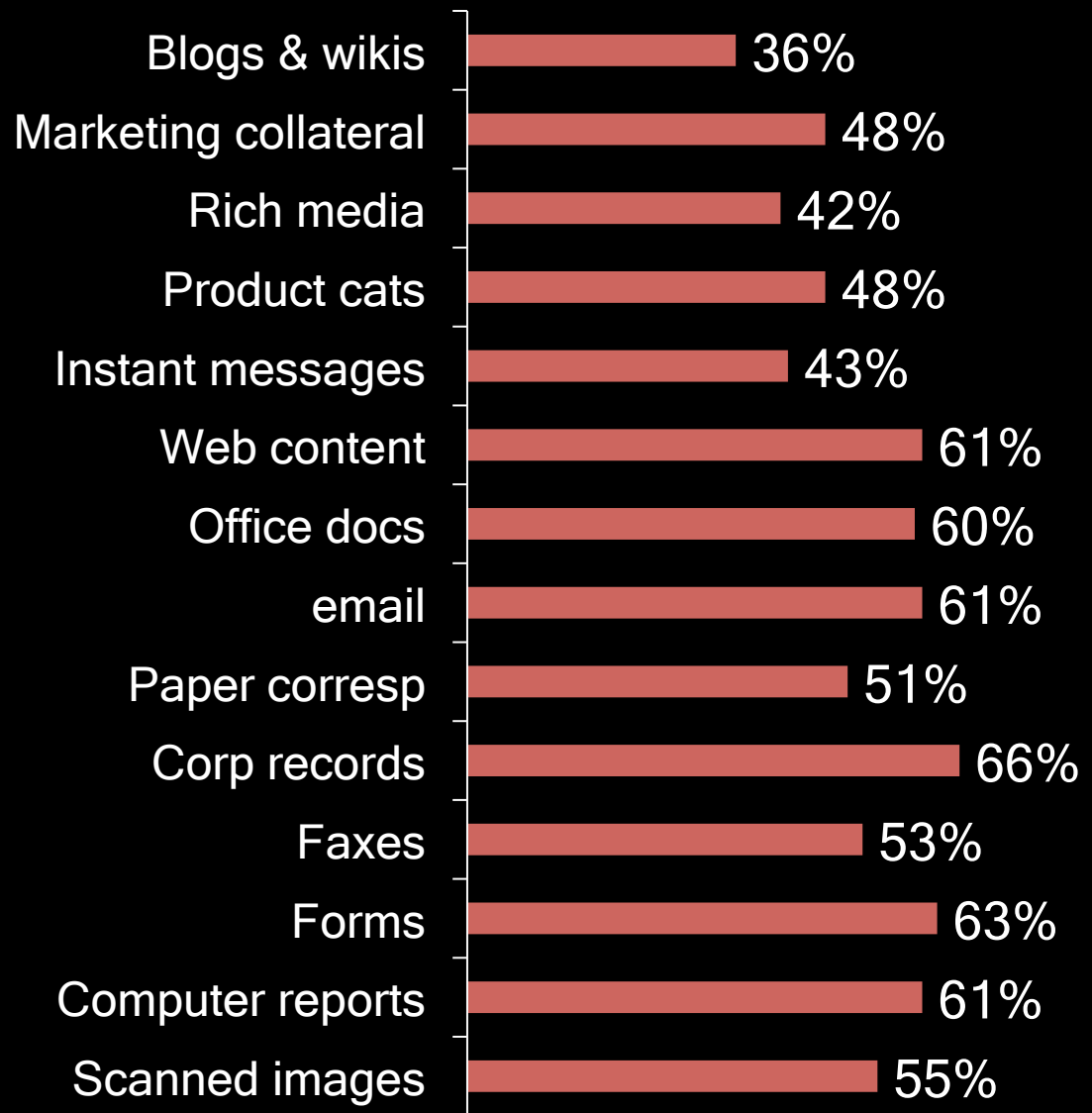
How confident are you that emails related to documenting commitments and obligations made by you and your staff are recorded, complete, and retrievable?



How confident are you that your organization could demonstrate that your electronic information is accurate, accessible, and trustworthy?



“Mostly” or
“totally” under
control



key findings

people get it when it comes to the
strategic importance of information
management

sense that information management is
“under control” **FAR greater** than is
typical in any AIIM or ARMA sample or
meeting

the most significant finding in the
survey:

those “outside” AIIM 4X more likely to
think everything is going pretty well re:
information integrity

most companies have yet to be
converted; in fact, they aren't even in
the church yet

most companies don't even realize that
they have a problem

**the context for
decision-making**

agree or disagree?

“Only those projects that can demonstrate positive hard dollar returns THIS YEAR are being approved.”

69% agree

agree or disagree?

“Capital requests are much more difficult to get approved than last year.”

69% agree

agree or disagree?

“We are actively seeking to reduce the number of technology solution providers from whom we buy.”

42% agree

agree or disagree?

“Technology outsourcing is now viewed
as a much more viable alternative than it
once was.”

38% agree

agree or disagree?

“The acceptable length of time to implement a project has been significantly cut.”

41% agree

agree or disagree?

“The economy has made open source solutions more attractive to my organization”

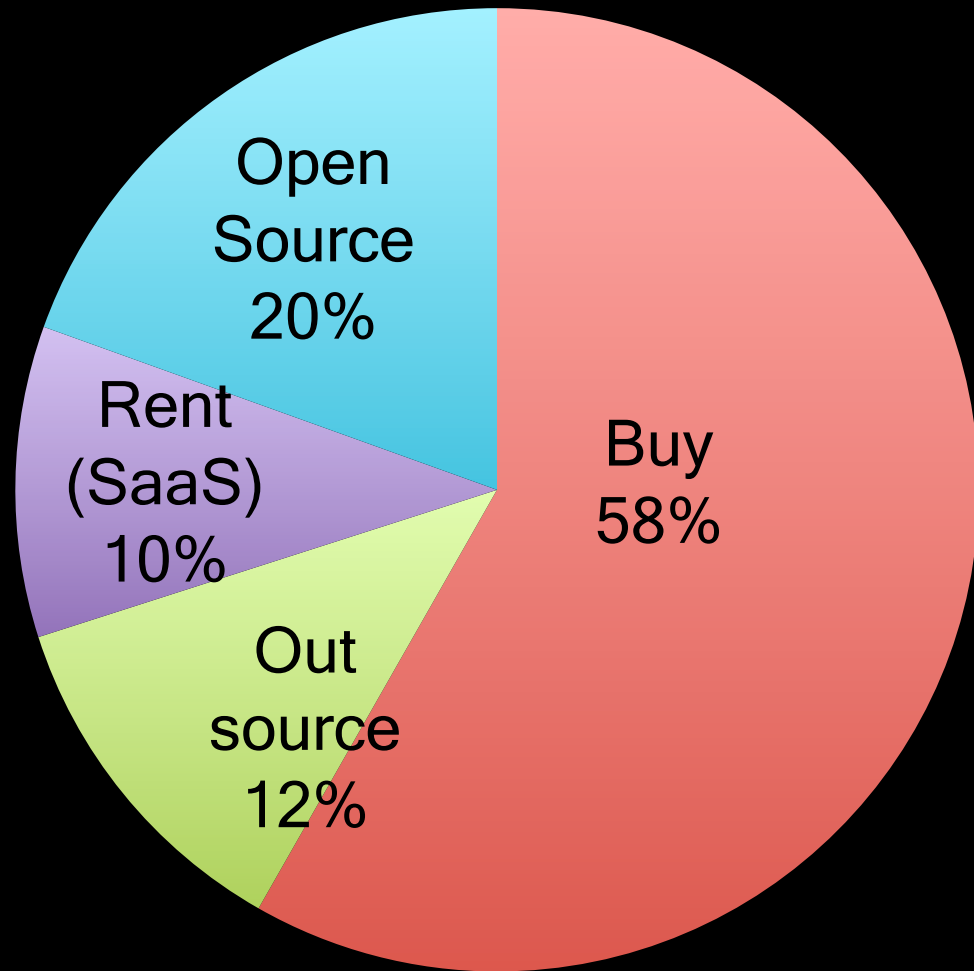
42% agree

agree or disagree?

“The economy has made SaaS solutions (i.e., software that someone else hosts and you “rent”) more attractive to my organization.”

33% agree

Which is the **PREFERRED** approaches in your organization to acquiring document management and scanning/capture capabilities (regardless of whether you have already implemented a solution)?



key findings

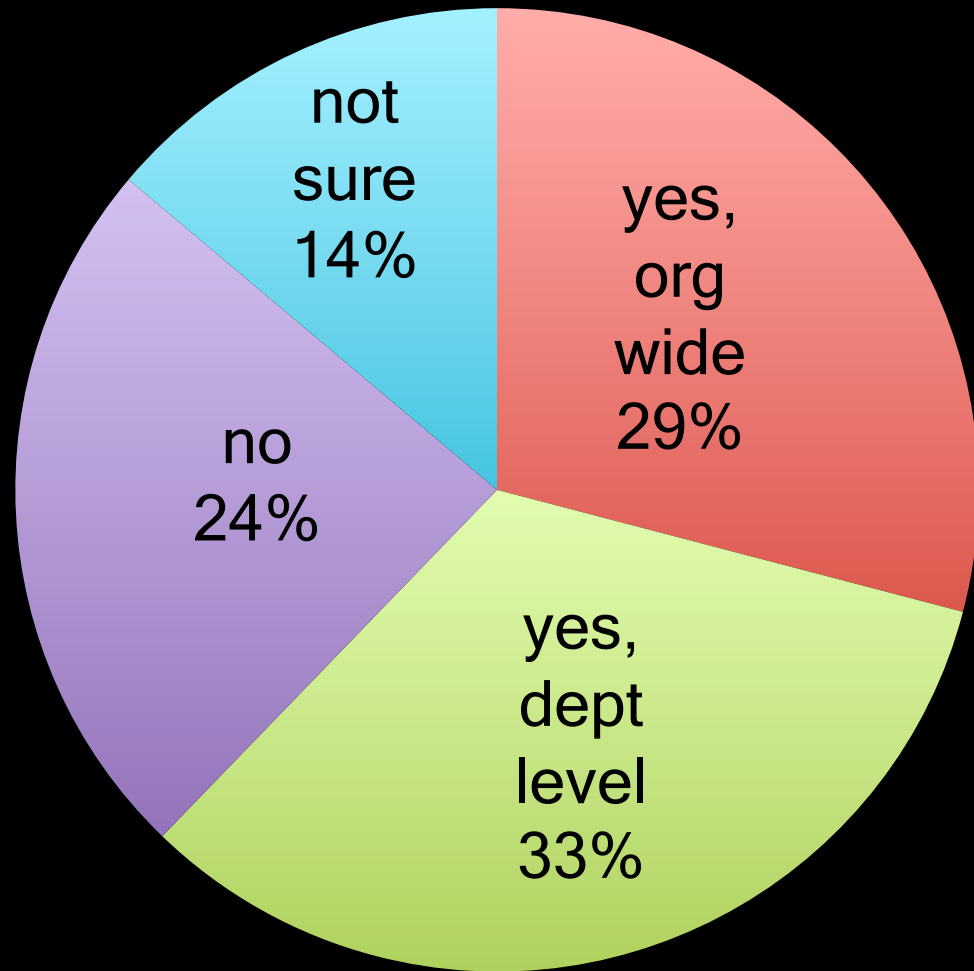
two key areas of agreement among end users when it comes to projects...

1. projects need to provide tangible hard dollar benefits **THIS YEAR** in order to have a chance of approval
and
2. capital approvals face an uphill battle

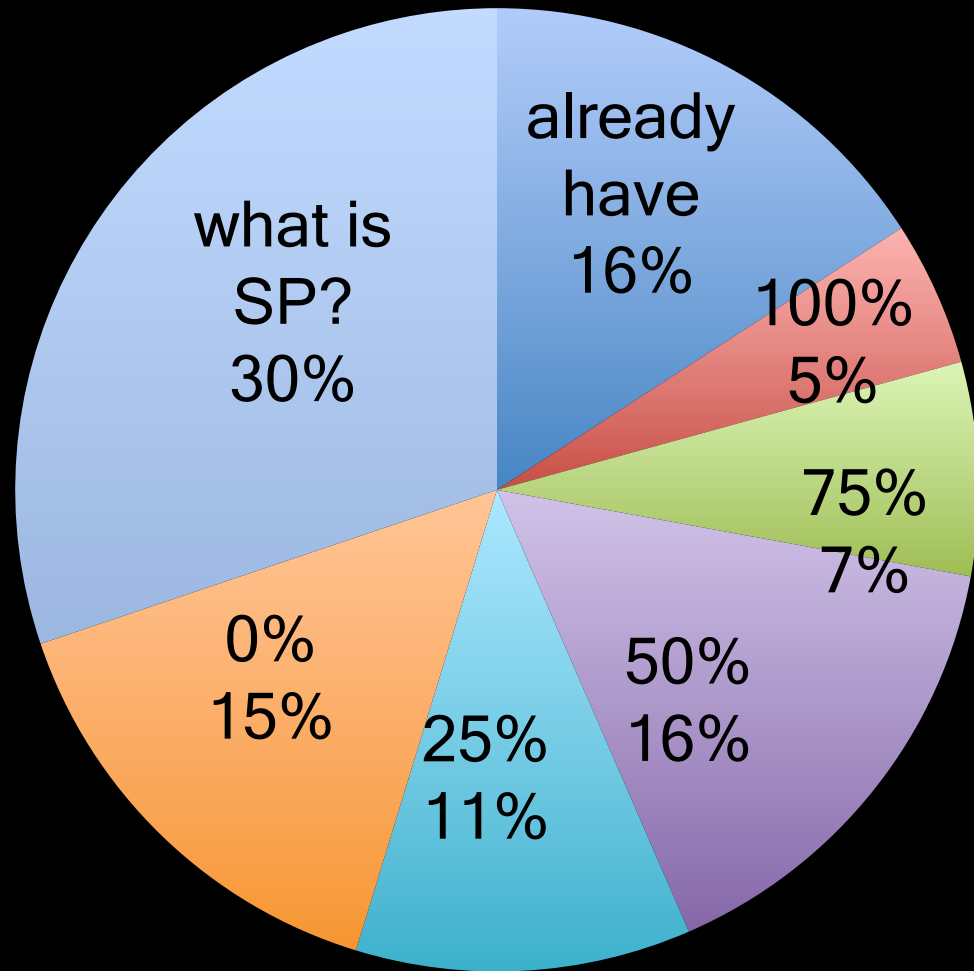
42% cite non-conventional approaches as **PREFERRED** DM approach

**revenue opportunities
this year**

Has your organization implemented a document management and scanning/capture solution?

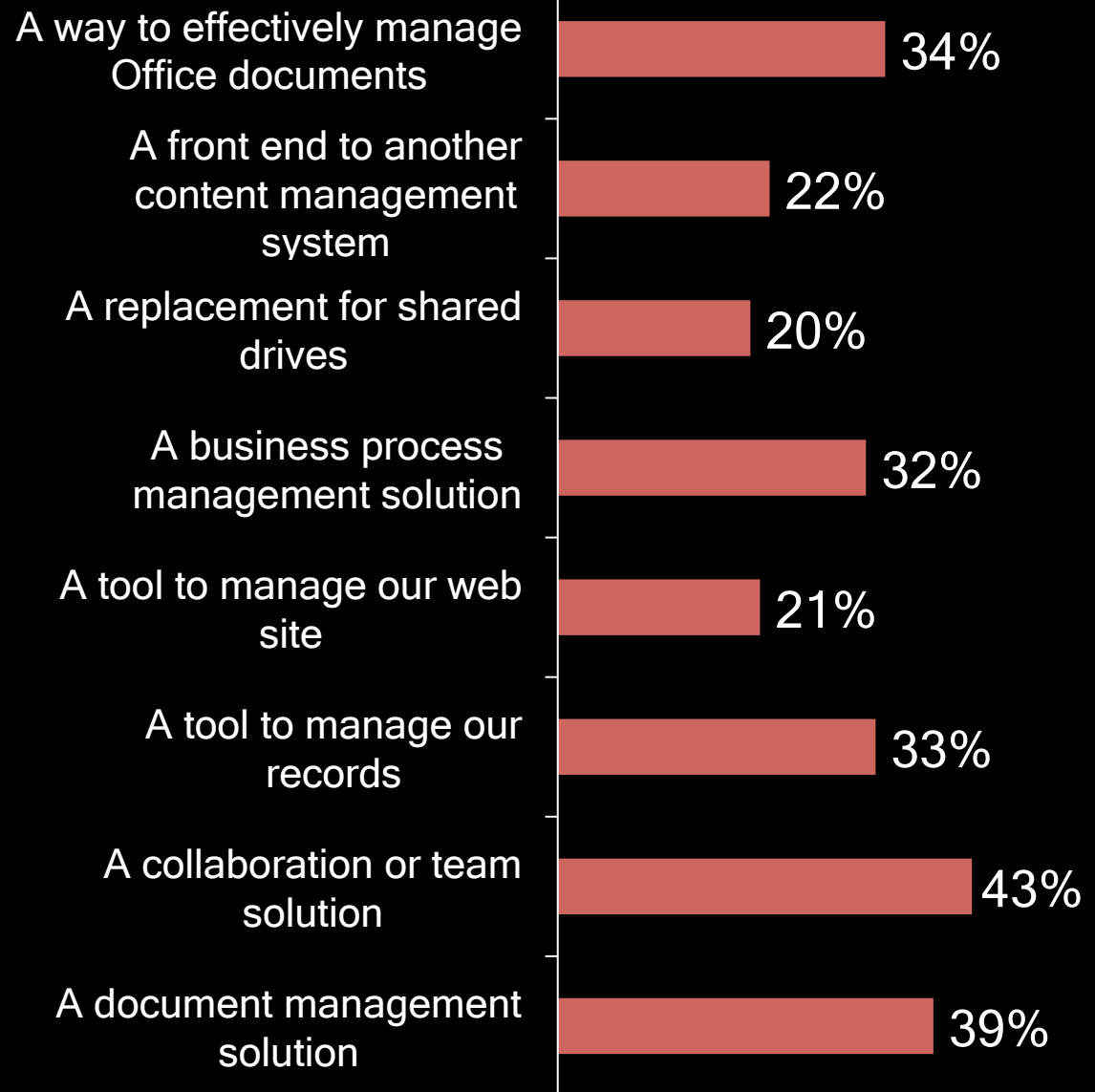


How likely is it that your organization will initiate a significant SharePoint solution in the next 180 days?



Please check off those statements that correctly describe how YOUR ORGANIZATION views SharePoint:
(Check as many as apply)

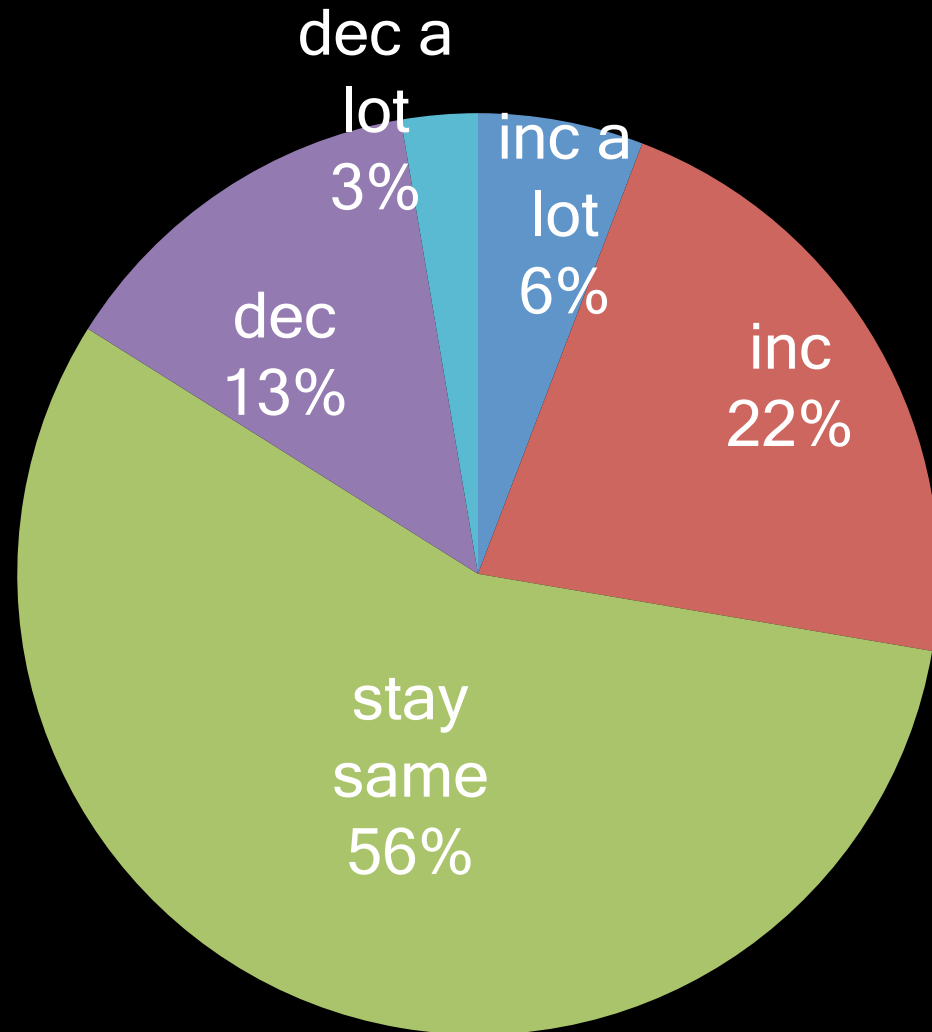
Only those familiar with SP



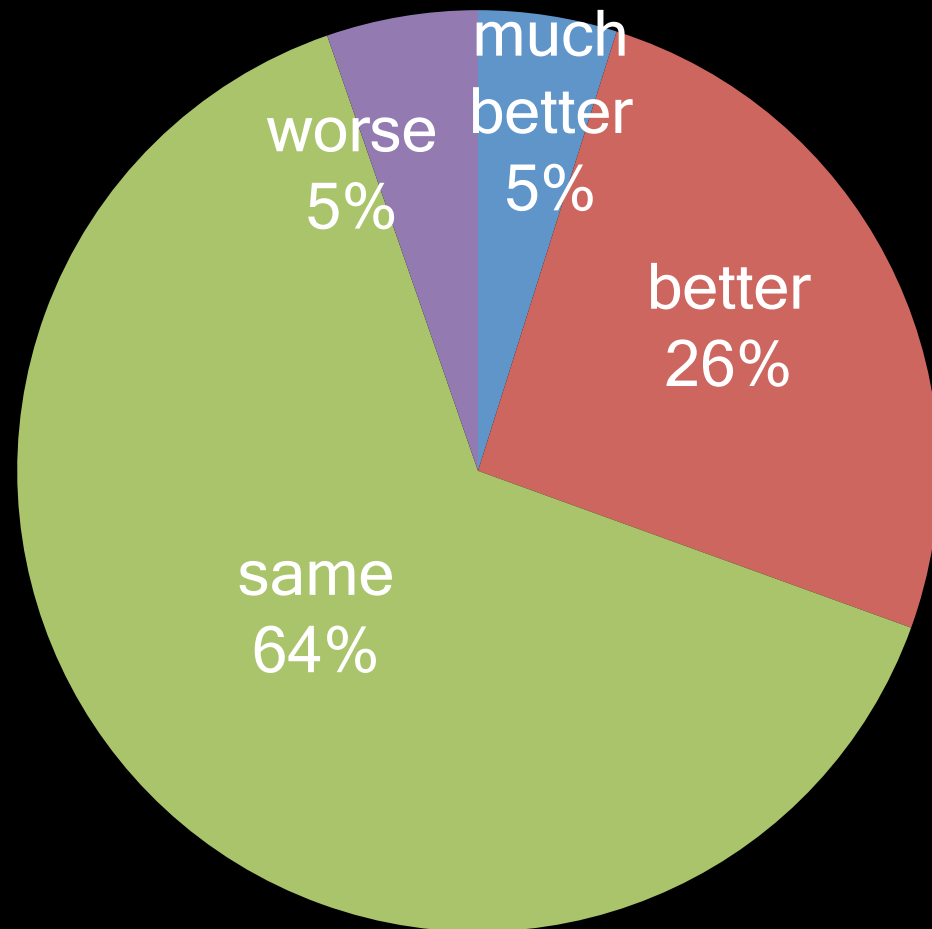
future revenue prospects among those
who have **ALREADY** implemented DM
somewhere in the organization

N=229

How do you think your organization's spending on document management and scanning/capture technologies will change over the next 180 days?



How does your return on investment (ROI) from document management and scanning/capture technologies compare to that which you have received from other significant technology investments?



future revenue prospects among those
who have no DM experience

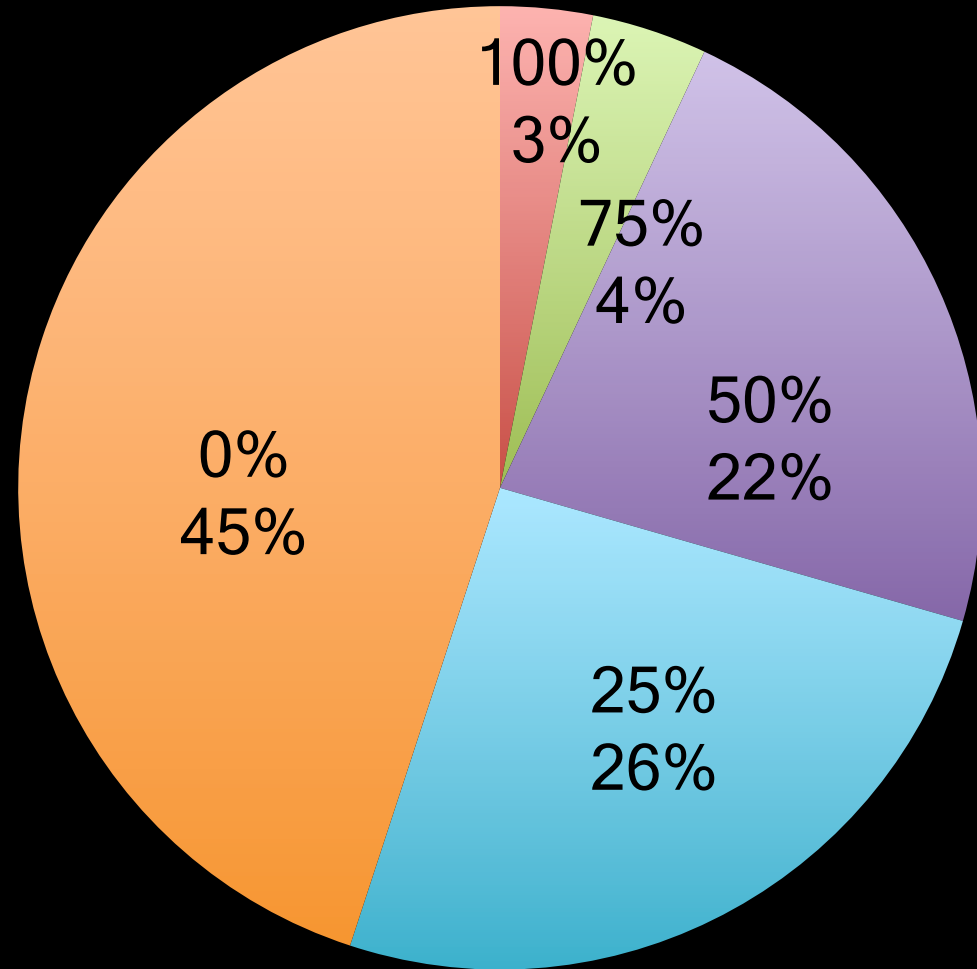
N=139

What are the top
THREE reasons
why your
organization has
NOT implemented
document
management and
scanning/capture
technologies to
date?

Reason	
ROI not clear	38%
Too confusing	7%
Lack of training	22%
How do I buy?	11%
More pressing tech needs	43%
Lack of industry customization	25%
Hard to eval comp and prods	10%
Costs too much	34%
Too hard to implement	9%
Lack of internal IT resources	37%

Perceived Obstacles		Real
Exceeding the planned budget	1	13
Lack of knowledge or training among our internal staff.	2	2
Failure to think or benefits/issues beyond our business unit.	3	9
Difficulty in prioritizing "high-value" content	4	12
Low user acceptance; poor design or clumsy implementation	5	10
Properly defining the business case	6	8
Derailing of project by internal politics	7	3
Lack of knowledge or training among our external staff/suppliers.	8	11
Uneven usage due to poor procedures and lack of enforcement	9	4
Underestimating the effort to distill and migrate content	10	5 (tie)
Underestimating process and organizational issues	11	1
Excessive "scope creep" beyond the initial project	12	5 (tie)
Addressing taxonomy and metadata concerns	13	7

How likely is it that your organization will seriously investigate a document management and scanning/capture solution over the next 180 days?



Think about the following processes that could be significantly automated using document management and scanning/capture technologies.

Please check off the **THREE** that would have the **MOST** value to your organization.

1. Budgeting
2. Invoice processing
3. Processes particular to our industry
4. Billing and shipping consolidation
5. Order processing
6. Expense reports
7. Purchase requisitions
8. Time sheets
9. Capital appropriation requests
10. Help desk
11. Performance reviews
12. Travel requests
13. New account setup
14. New hire processes
15. Policy compliance
16. Sarbanes-Oxley compliance
17. Lead management
18. Leave requests
19. Proposal generation

key findings

60% have already implemented a DM solution

large companies 2X as likely to have already implemented significant SharePoint solution; mid-sized companies much more likely buyers in near future

only 16% of current customers plan a decrease in spending in next 180 days; 28% plan an increase

key findings

reasons for NOT buying tied directly to missing sense of urgency

non buyers think this will be a money pit; do not understand the REAL obstacles to implementation - the “softer” issues

vertically specific solutions and internal finance automation represent best short-term opportunities for new customers