

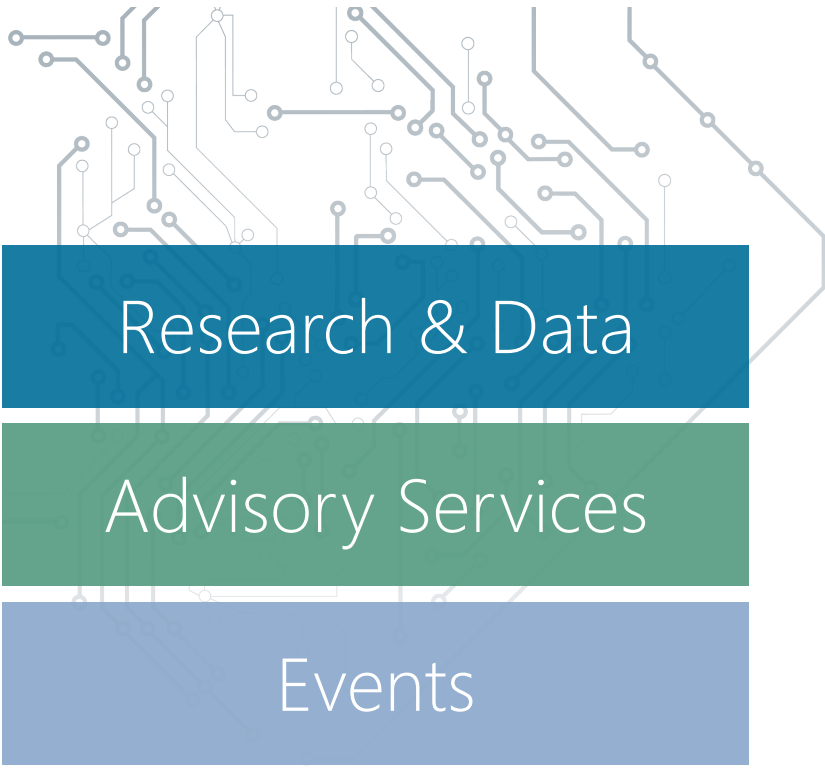
The logo for 451 Research, featuring the number '451' in white inside a dark blue circle, which is itself inside a larger, lighter blue circle.

451

Research®

## The future of ECM?

Alan Pelz-Sharpe  
Research Director - Business Applications



Research & Data

Advisory Services

Events

## 451 Research is an information technology research & advisory company

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Founded in 2000

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350+ employees, including over 100 analysts

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1,000+ clients: Technology & Service providers, corporate advisory, finance, professional services, and IT decision makers

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25,000+ senior IT professionals in our research community

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Over 52 million data points each quarter

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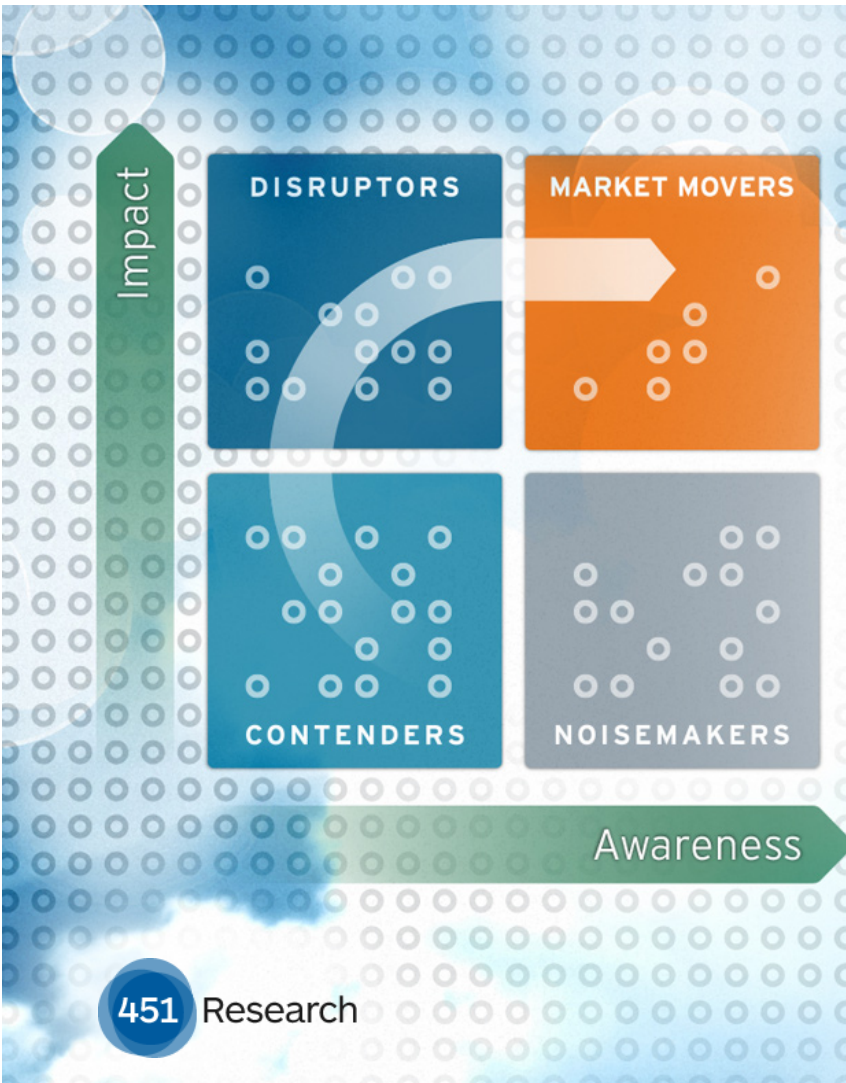
4,500+ reports published each year covering 2,000+ innovative technology & service providers

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Headquartered in New York City with offices in London, Boston, San Francisco, and Washington D.C.

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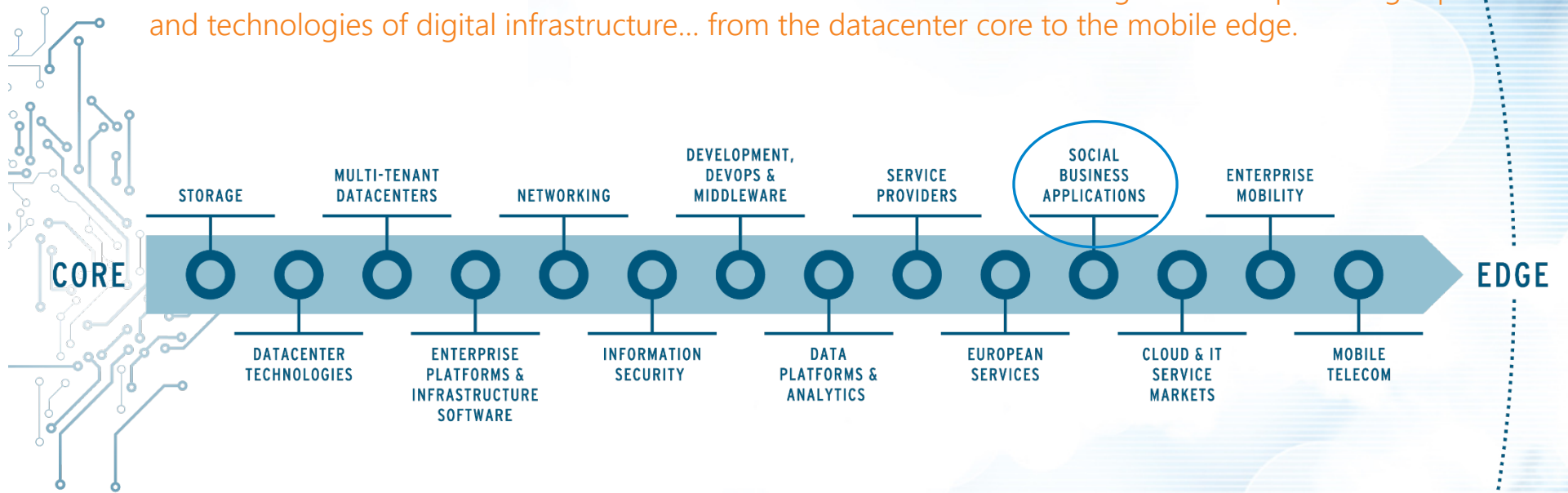
451 Research and its sister company Uptime Institute comprise the two divisions of The 451 Group



451 Research provides unique insight into emerging, disruptive technologies and the companies taking them to market.

# Research Channels

A combination of research & data is delivered across fourteen channels aligned to the prevailing topics and technologies of digital infrastructure... from the datacenter core to the mobile edge.



## About me.....

- Roots as a user and implementer of information systems
  - 25 years in Information Management
  - World class cynic and doubter
  - Dual National UK-USA
- 
- Screen actor and future Oscar winner (still have dreams)
  - Spend too much time in the Silicon Valley bubble
  - Write too many reports
  - Full time worrier that people take my opinions too seriously



# Today

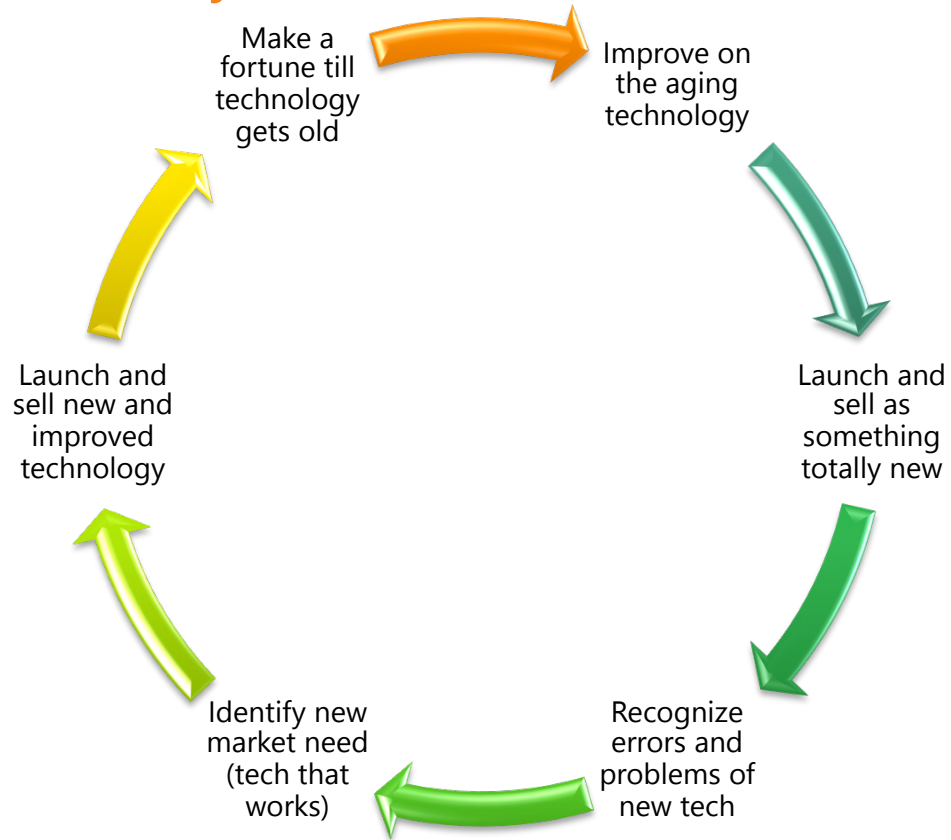
- ECM today and tomorrow
- The impact of SMAC
- File Sync & Share
- Challenges and opportunities

# A changing world

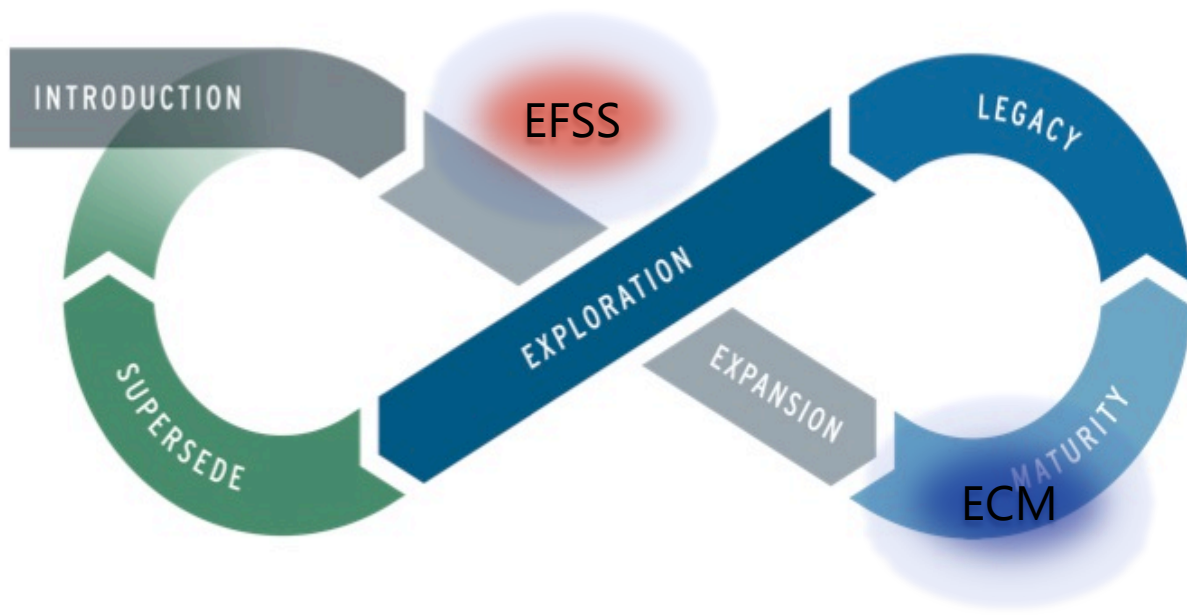
- Global downturn – USA, EMEA
- Africa, South America, Asia – growing
- US still center of new technology
- US no longer the center for innovation in the workplace
- Practicality always wins out in the long run

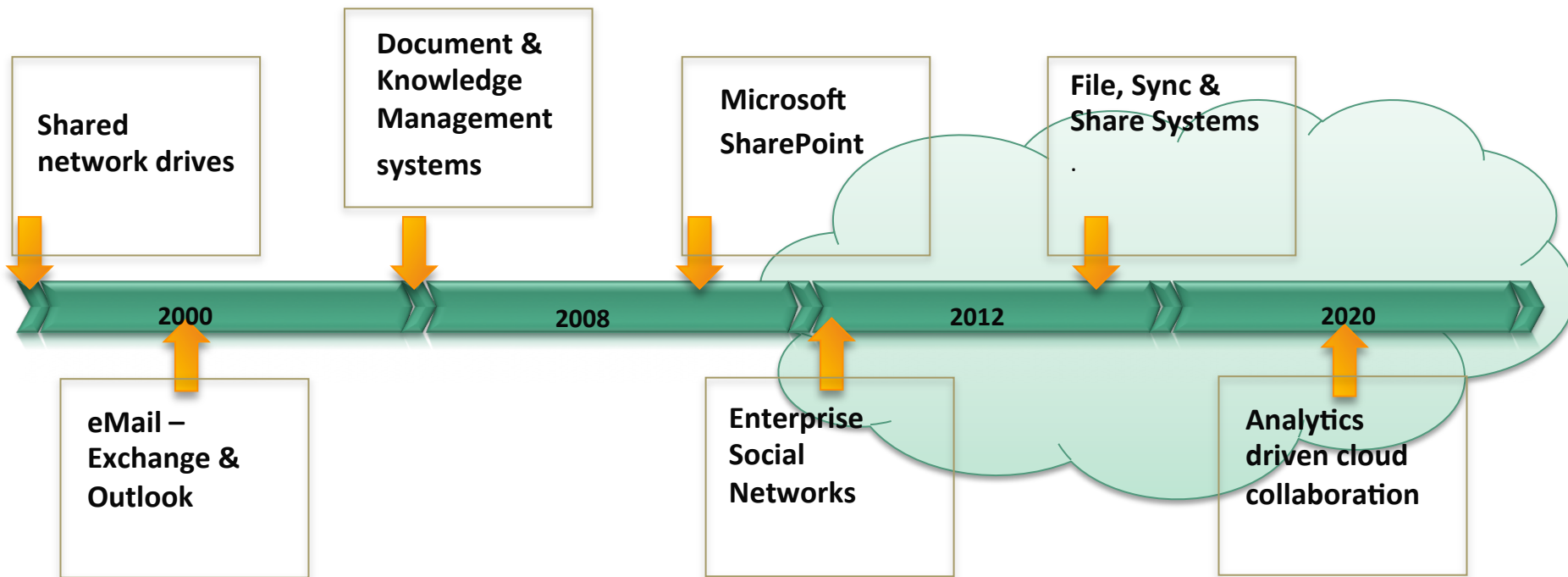


# How Silicon Valley Works

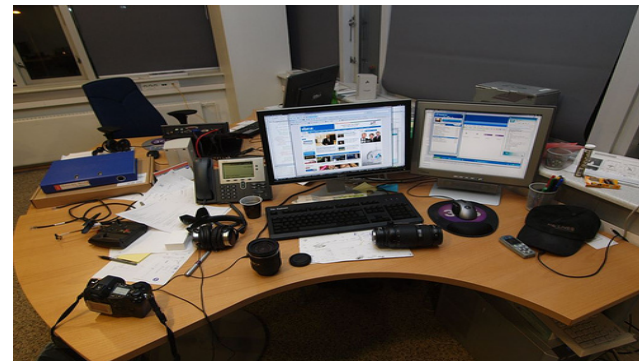








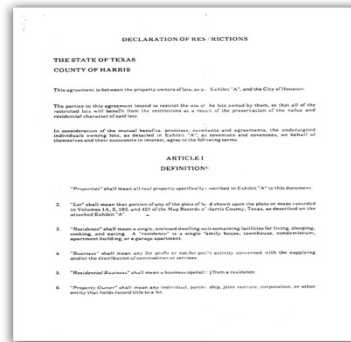
# Universal Workplace Problems



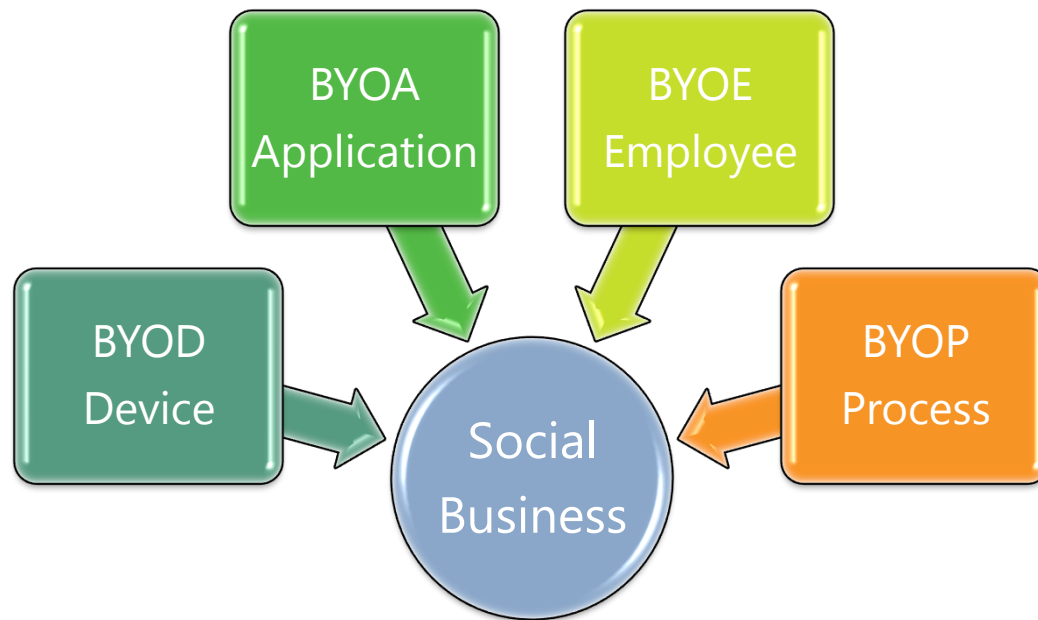
# Typical Scenario



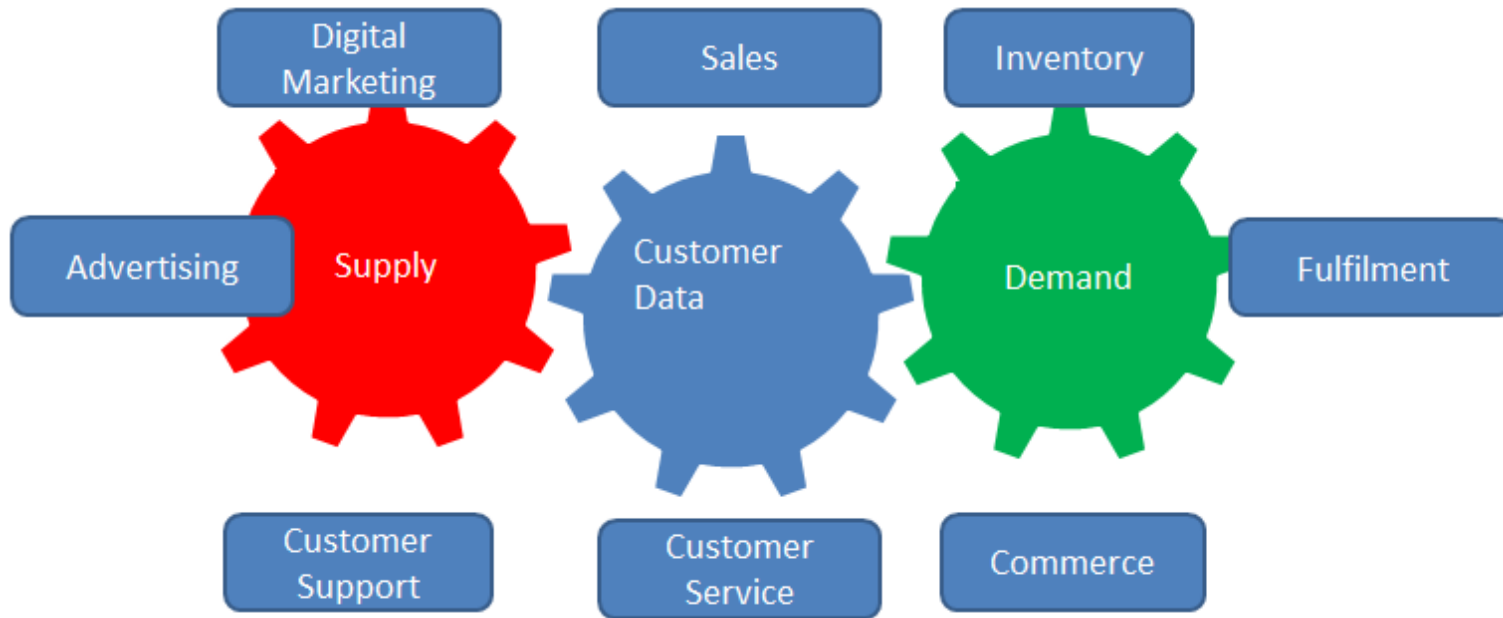
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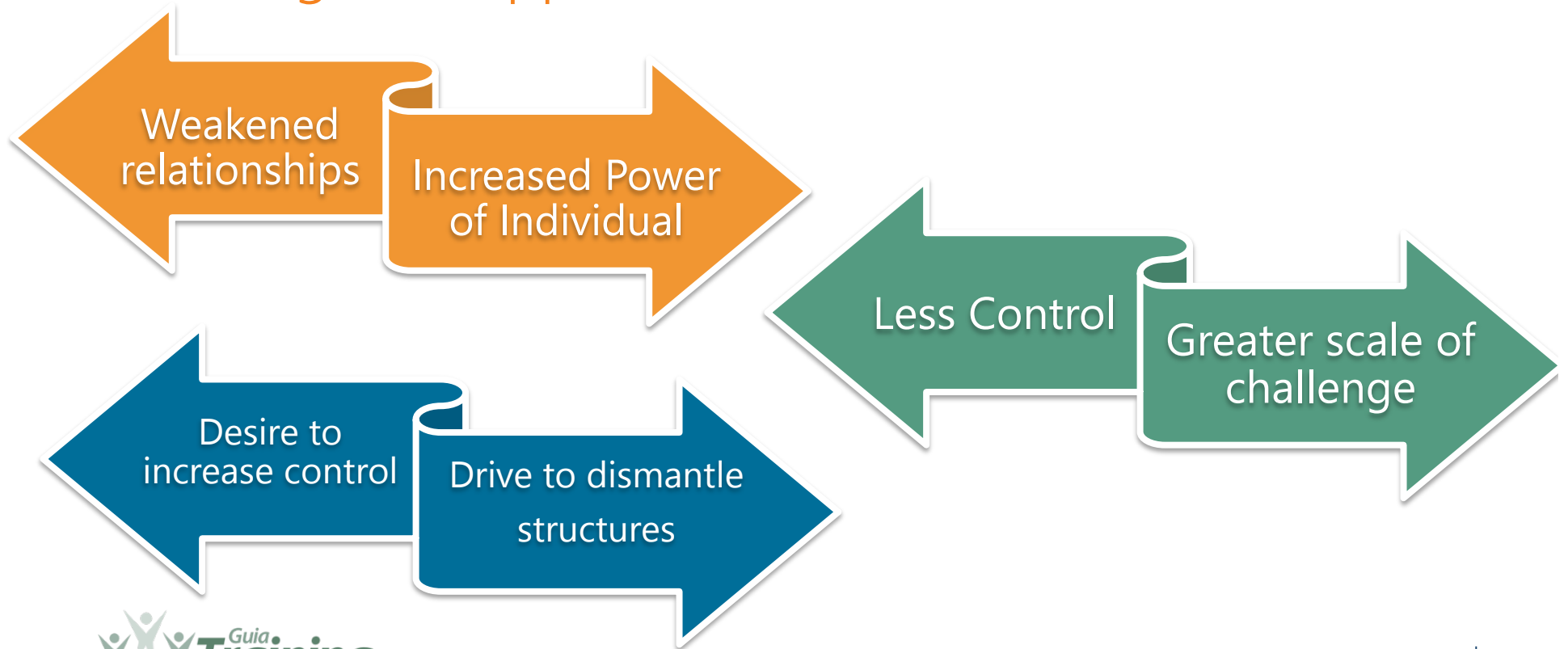
# Changing Dynamics



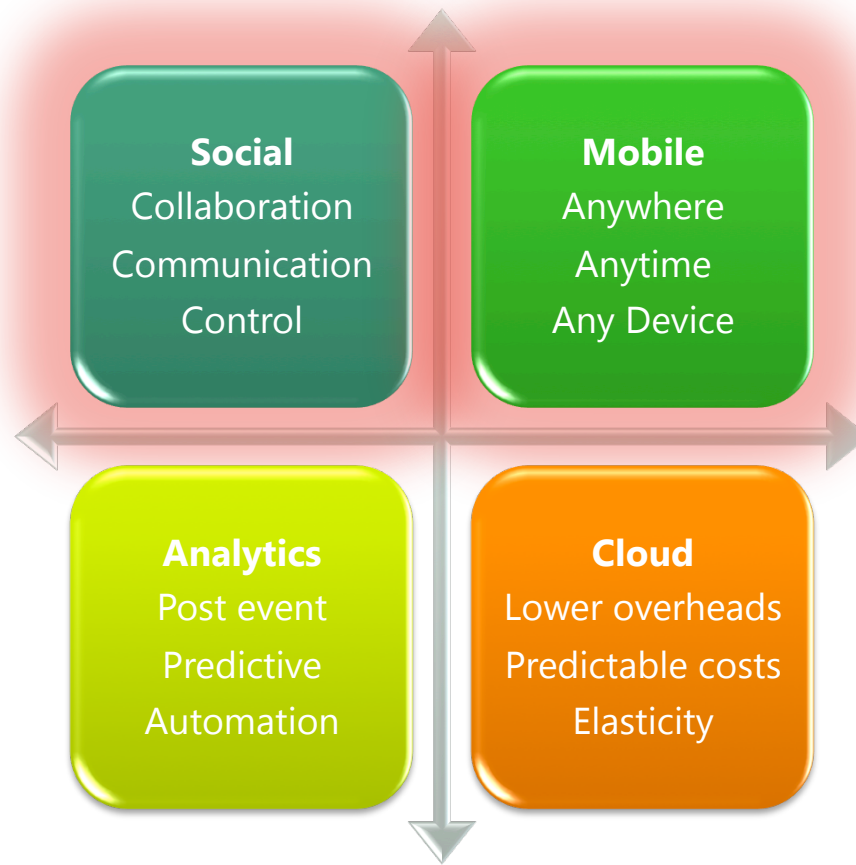
# Dynamic Supply Chain



# Challenges & Opportunities of Social Business

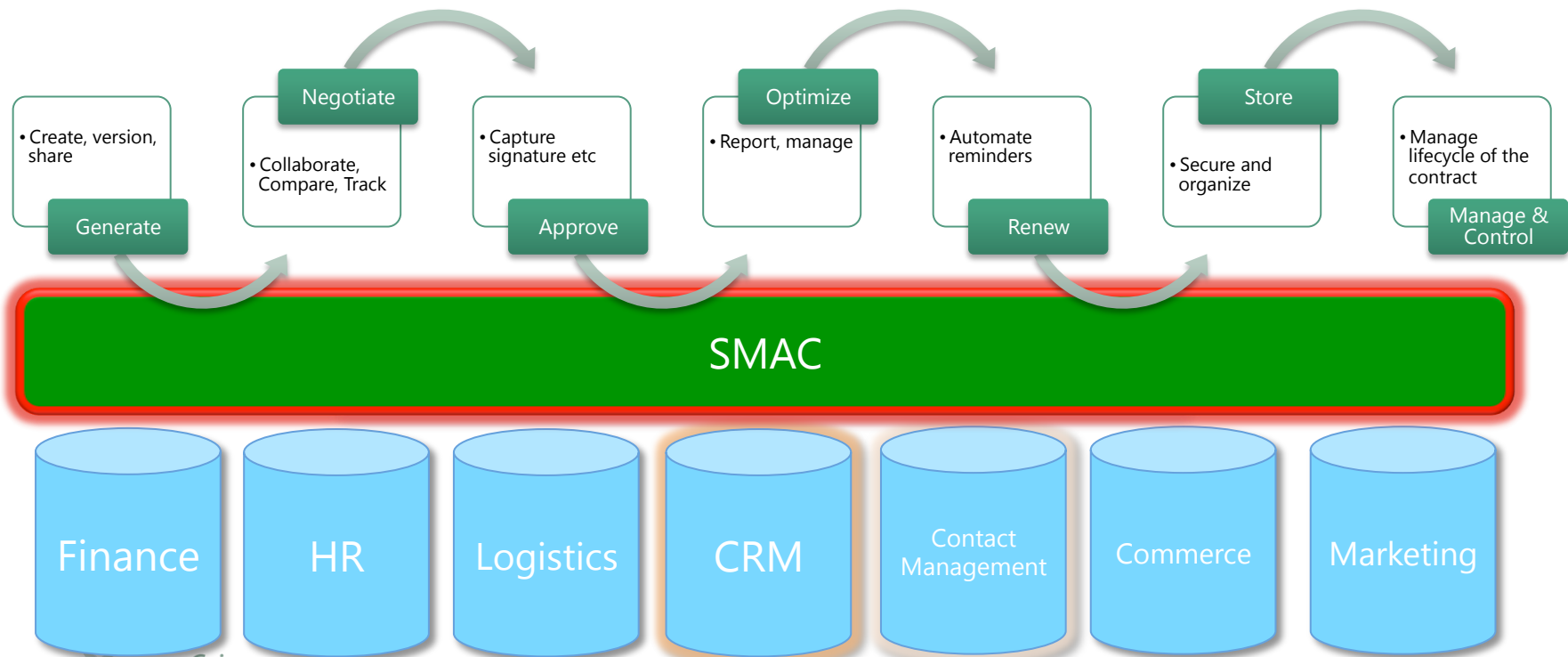


# SMAC

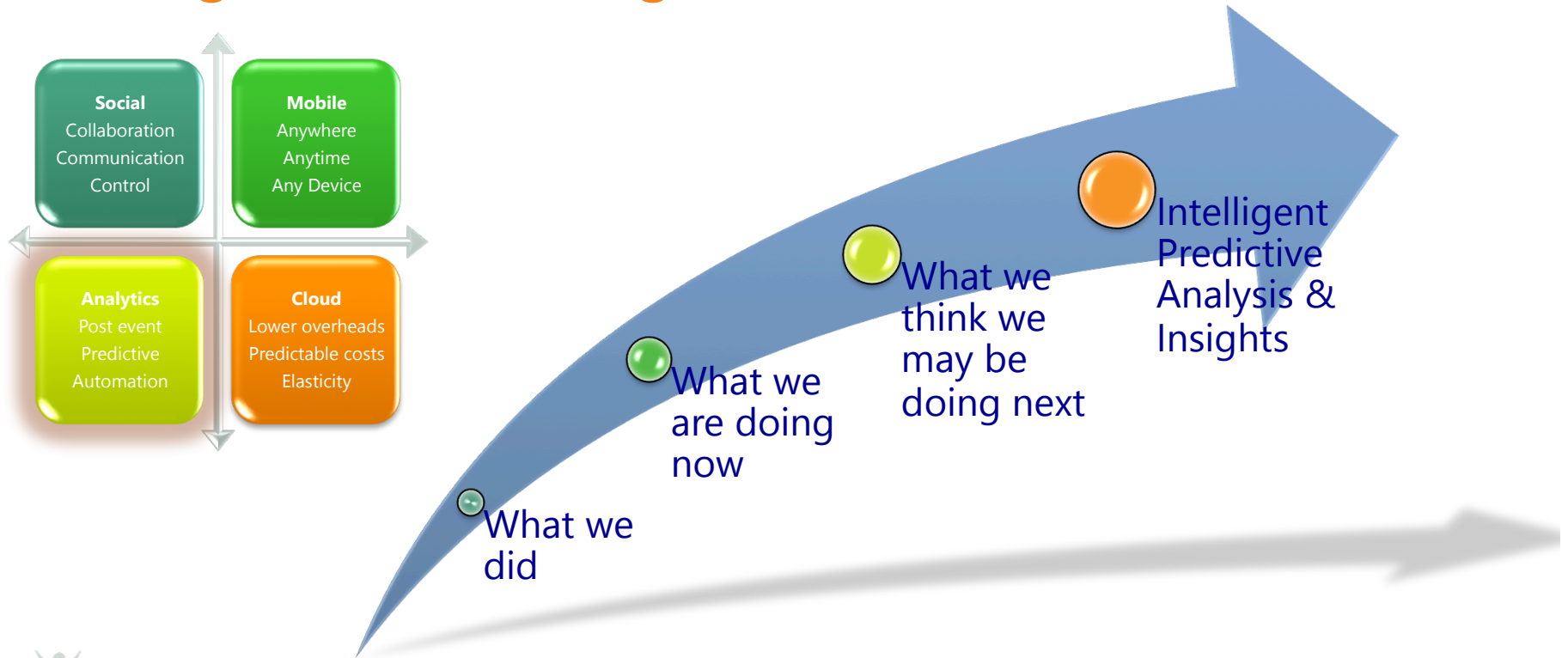




# Example contract and sales data

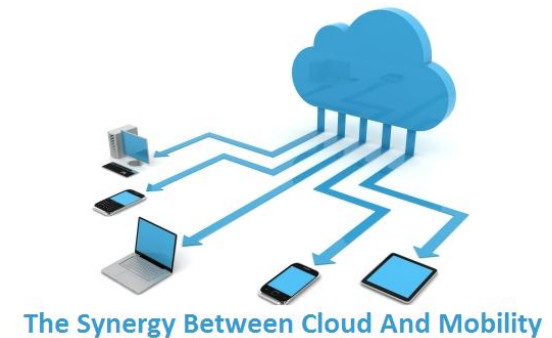


# Looking back to looking forward



## SMAC in the real world

- Major Healthcare Organization
  - Patient Records – Security/Compliance – Mobility
- Hospitality
  - Customer Records – Multi-Channel Marketing – Customer Support
- Heavy Engineering
  - Document access and review – contract negotiations - geographies



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# Enterprise File Sync & Share

## What is EFSS?

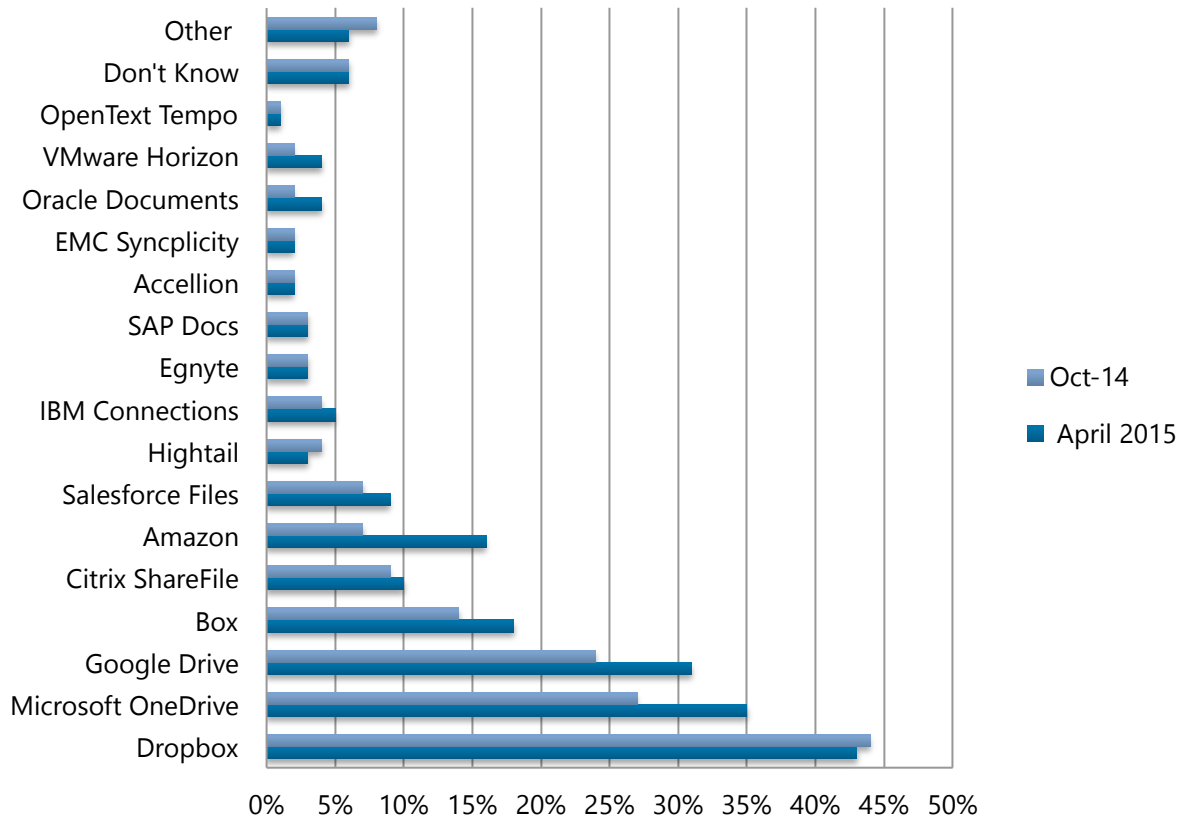
*The ability to create and store a file once and have that same file copied, automatically accessed and synchronized across multiple locations and devices...*

Access, anytime, anywhere any device

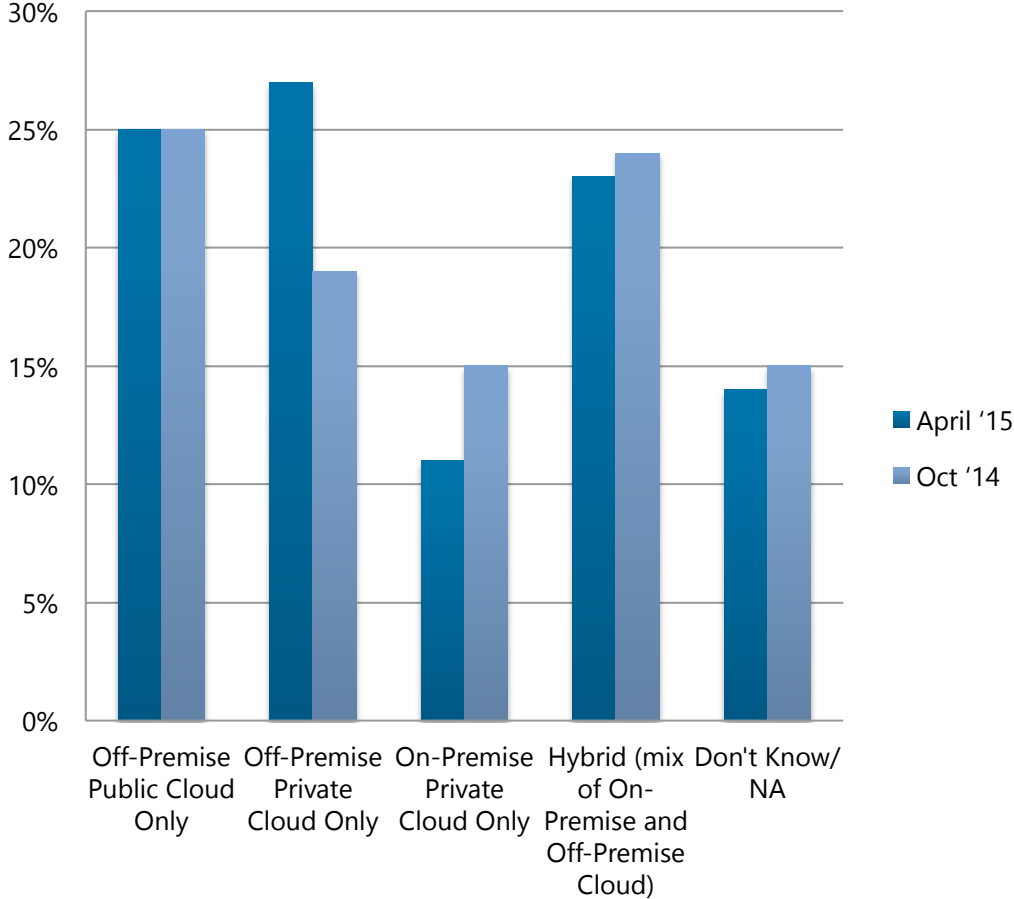
Over 100 services now available – such as Box, Dropbox & Google Drive



## Most popular paid EFSS services



# EFSS Deployment preferences



## EFSS common uses



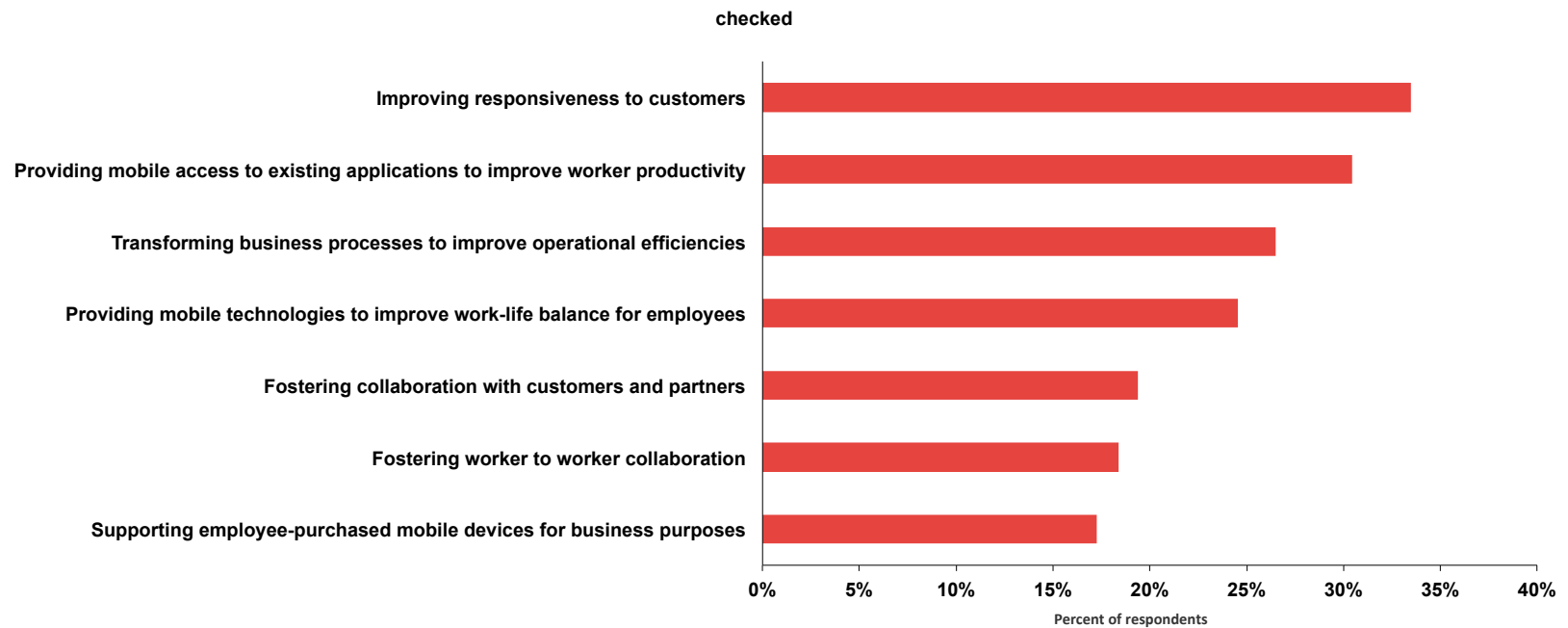


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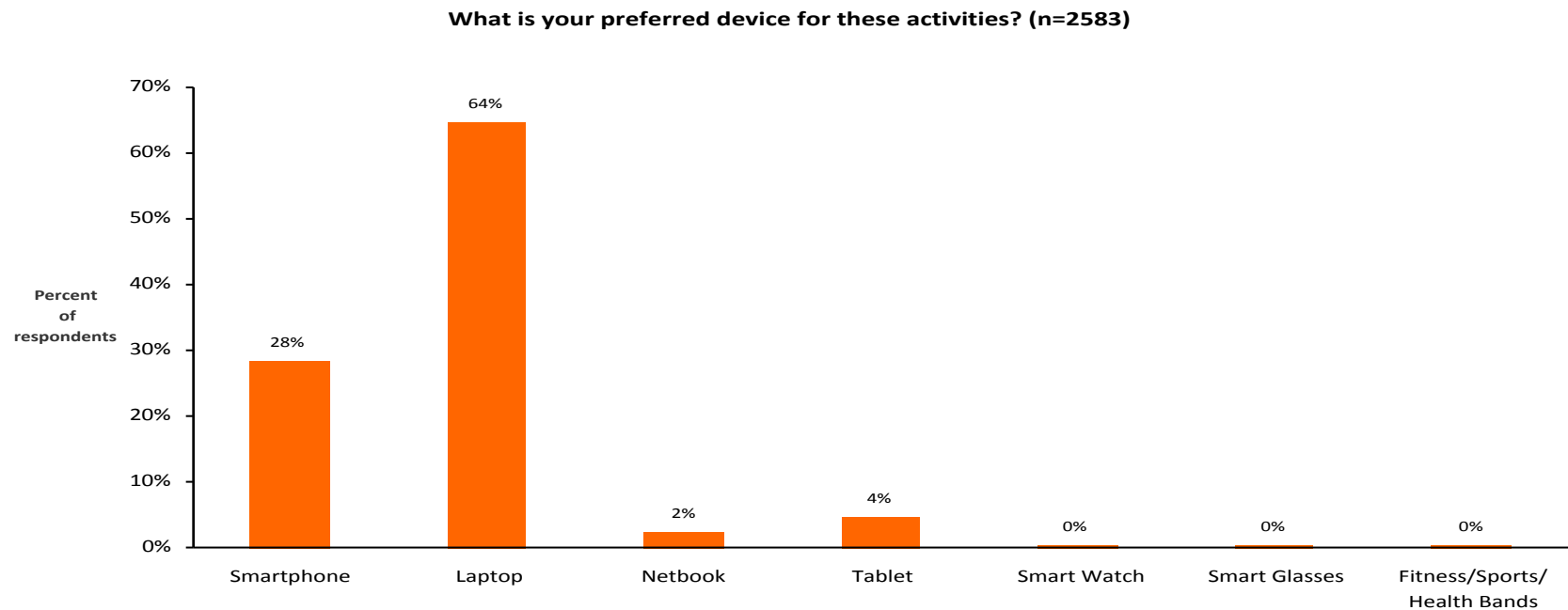
Mobility

# Drivers of investments in mobility solutions



Base: Asked everybody

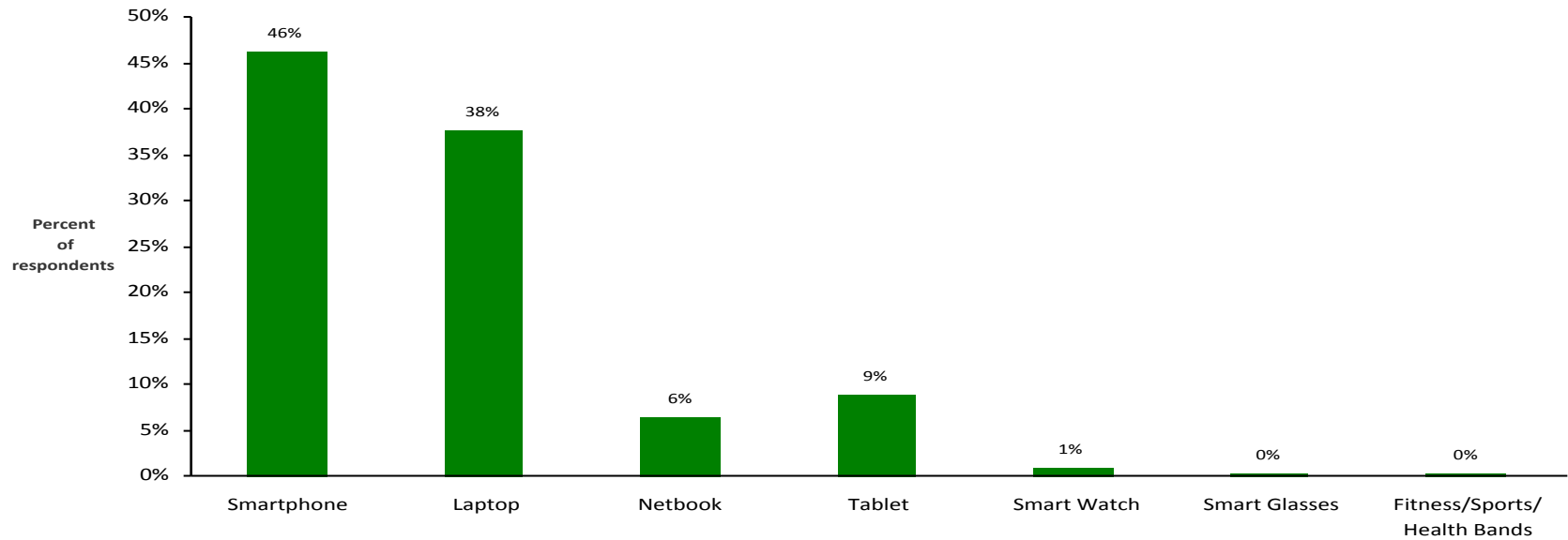
# Preferred device for document creation and editing for work purposes



Base: Asked to those who do the activity monthly or more frequently and have multiple devices. Answer is autopopulated if one device

# Preferred device for social media for work purposes

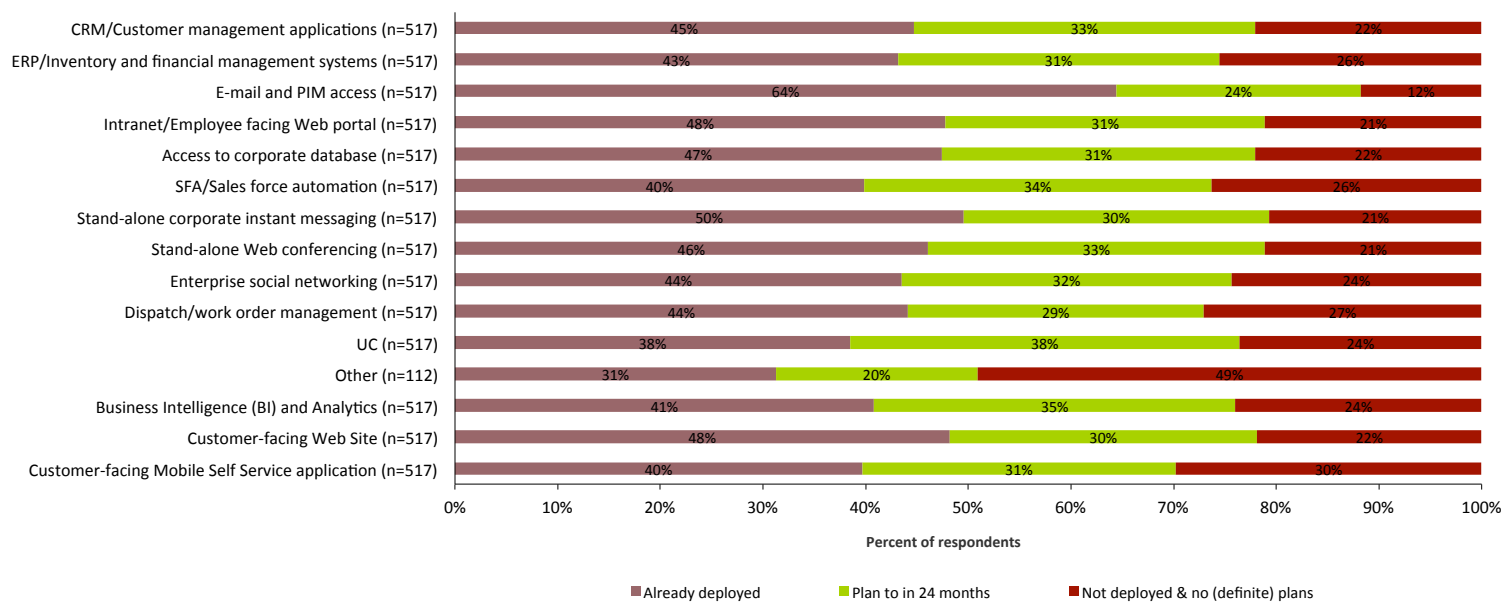
What is your preferred device for these activities? (n=2309)



Base: Asked to those who do the activity monthly or more frequently and have multiple devices. Answer is autopopulated if one device

# Applications deployed on smartphones

Which of the following applications has your organization deployed or plan to deploy on smartphones?

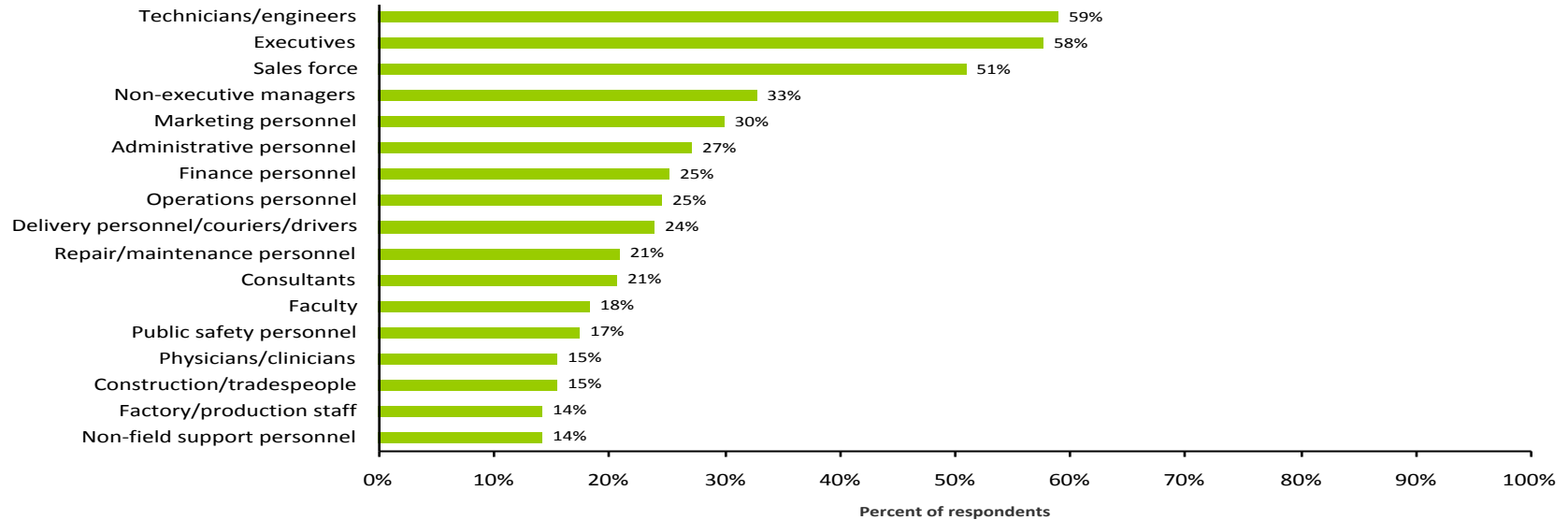


Base: Asked everybody who deployed/plan to deploy mobile applications



# Top employee candidates for using mobile applications on smartphones

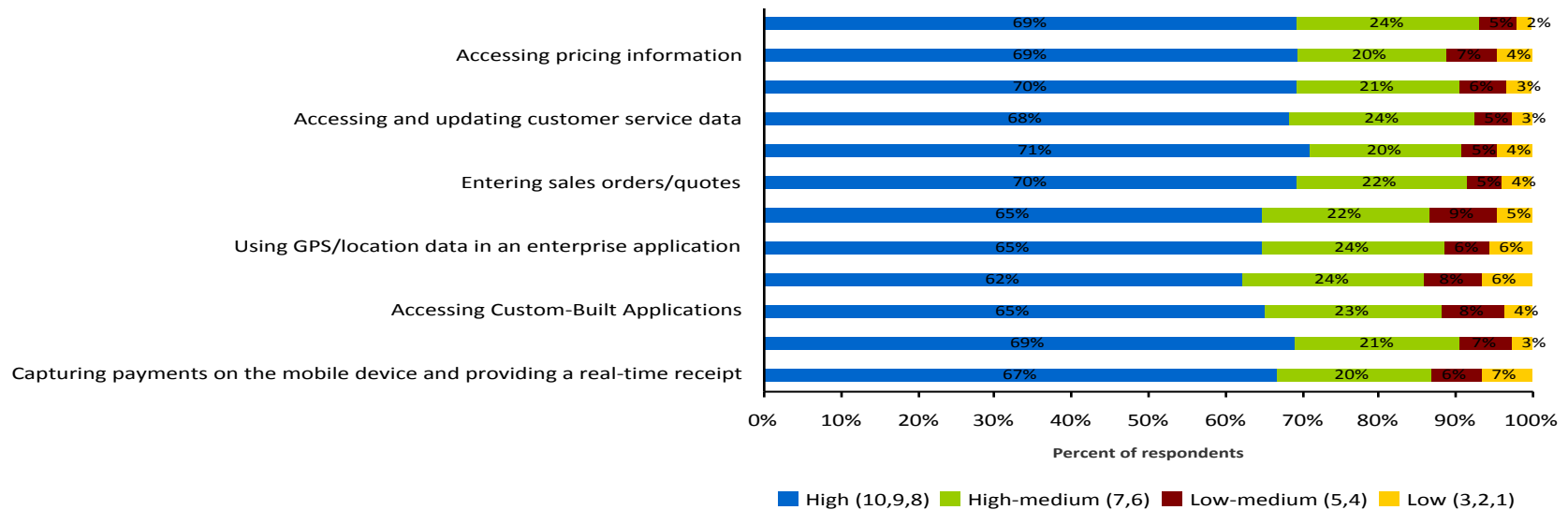
Which groups of workers are your top priority when deploying applications on a smartphone and tablet? (n=506)



Base: Asked everybody who deployed/plan to deploy mobile applications on smartphones

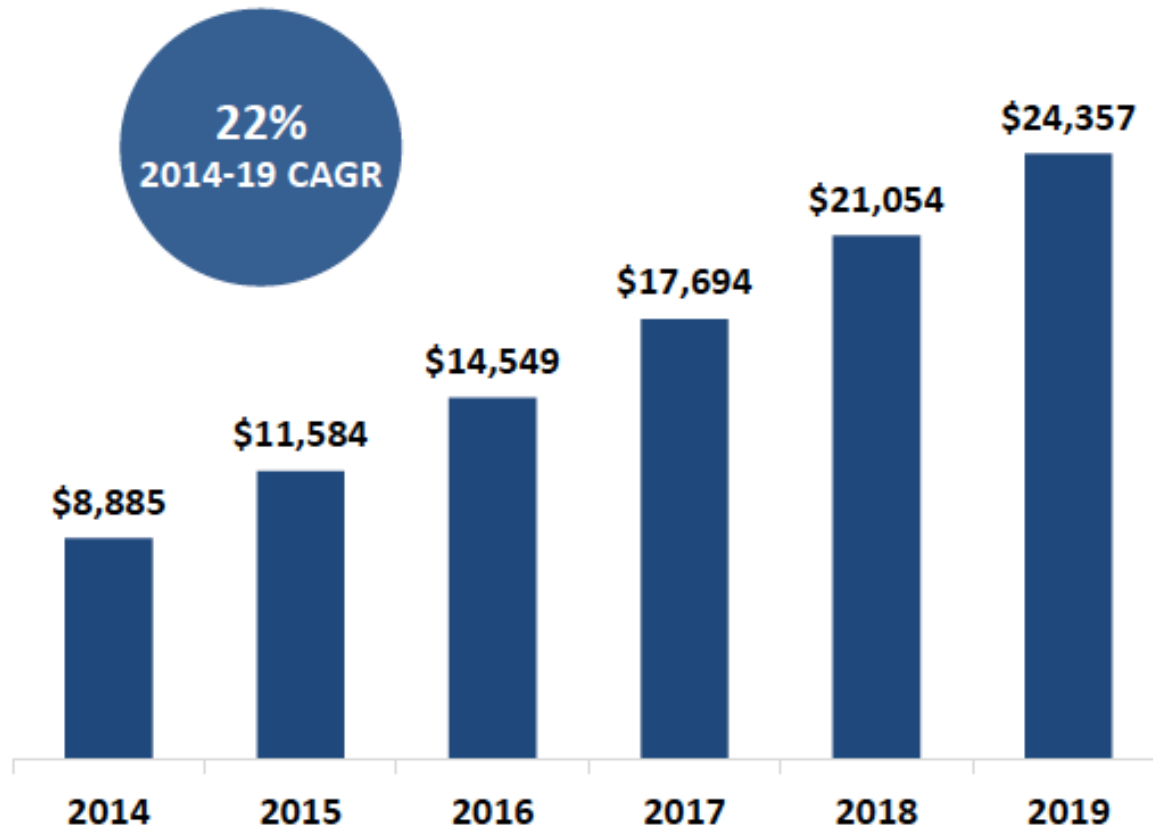
# Importance of providing mobile applications for business processes

Thinking about the use of smartphone devices within your work environment for your employees, please rate the importance of providing mobile applications for the following business processes using a scale of 1 to 10? (n=517)



Base: Asked everybody who deployed/plan to deploy mobile applications

## Global EC/S Revenue (\$M)





## Continuing Challenges

- Ever more silos of content and data
- Tactical rather than strategic thinking
- Ever greater of buying, accessing and building applications
- Poor financial planning for technology investments
- Technology led business solutions
- The continued search for Unicorns & Silver Bullets
- Chasing the dream
- Seldom tying technology projects to measurable business processes
- Rip & Replace mentality vendors
- Over promising and under delivering

## Key trends

- SMAC is already having a real impact
- Questioning whether SMAC enhance and improve your products and services?
- Thinking holistically – not departmentally
- Recognizing that customer data is under leveraged in most firms – focus on rationalizing, cleaning and boosting the core CRM
- Grasping that document work work is moving away from traditional desktop/ doc management to mobile devices
- Phones and handhelds are rapidly becoming the critical tool for accessing key customer data
- Asking what needs to change in the corporate organization and culture to gain the maximum value from SMAC technologies?

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