Rocket®software

2022 Survey Report: Content Management

The Movement to Modernization

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Introduction

If you asked business leaders what their company's most valuable asset is, most would agree it's their company's data. Yet, most businesses fall far short when it comes to realizing the full potential of all the truly powerful information they have, especially their content. A vast majority of content within a company is processed but never used—this content is known as "dark data." And, research from the Association for Information and Image Management (AIIM) found that more than 60% of today's corporate data is unstructured, and a significant amount of this unstructured data is in the form of non-traditional "records," like text and social media messages, audio files, video and images, and these numbers are expected to grow in the coming years.

With the amount of available information growing daily and unstructured data making up the majority of corporate data, organizations across all industries have started or continued to accelerate their digital transformation efforts. Statista estimates that global investment in digital transformation is expected to almost double between 2022 and 2025, from $1.8 trillion to $2.8 trillion. Part of this investment includes implementing new and innovative content service technologies and practices, which allow IT and data management teams to improve the way they use and govern their content.

To gain a better understanding of businesses' efforts to harness their content management operations and move to modernized digital practices, Rocket® Software, a global technology leader that develops enterprise software for some of the world's largest companies, surveyed more than 500 corporate IT and line of business professionals across multiple industries in the United States (U.S.), United Kingdom (U.K.) and Asia-Pacific (APAC) regions in August 2022. Respondents were asked about their companies' digital transformation movement and what aspects of content management solutions they found to be most important.
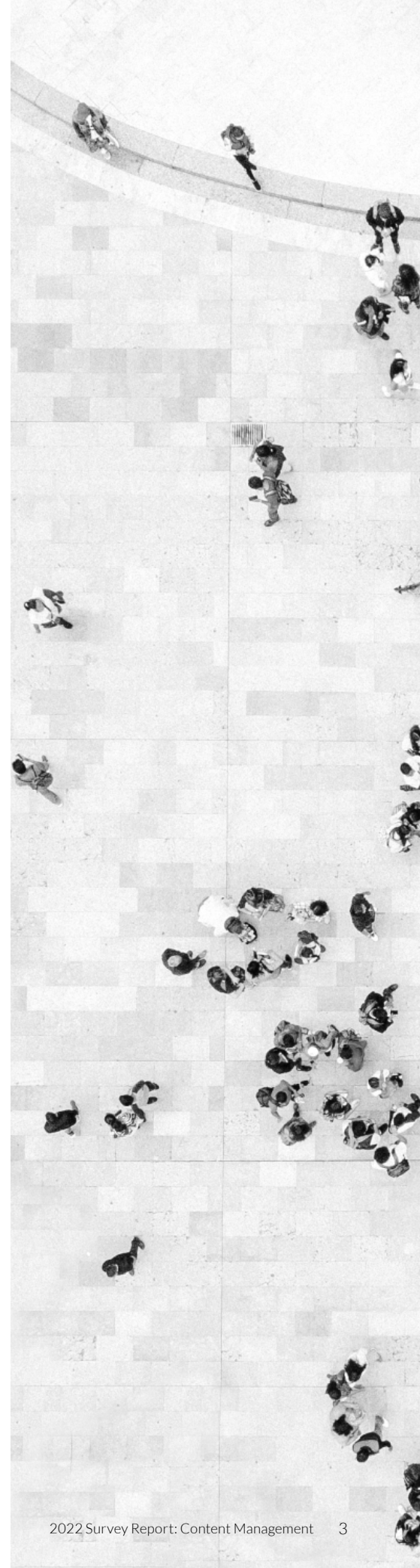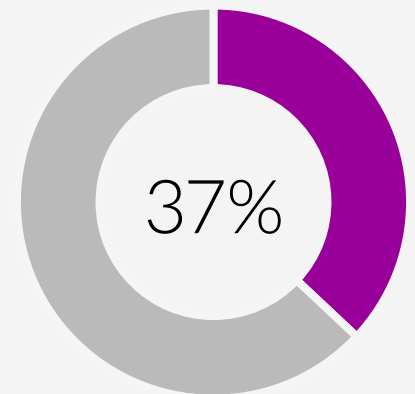
The Challenges of Content Management

In today's fast-paced digital corporate landscape, content management practices must be more effective and responsive. When it comes to companies taking advantage of valuable data, the windows of opportunity have grown smaller. Businesses need to find ways to analyze and process information faster. With data management teams tasked with processing, storing, and governing data, manual processes and old ways of working have left businesses vulnerable and at a disadvantage with their competition.

How we send and receive information has created even more challenges for companies using traditional content management processes. Today, employees communicate along multiple channels while saving data on personal drives, leaving organizations vulnerable to content sprawls—when sensitive or valuable content assets are left unmanaged throughout various systems. In fact, 37% of respondents said employees saving content on shared- and personal drives presents the greatest challenge to their company's ability to manage content successfully.

What are the biggest challenges your organization faces when it comes to content management?

(All respondents)

%	Challenge
37%	Employees saving content on shared drives /personal drives
36%	Migrating to the Cloud
34%	Retaining redundant / unnecessary information
34%	Risk of non-compliance with privacy regulations
33%	Limited skills among current staff
30%	Risk of non-compliance with industry regulations
28%	Retaining /storing content for too long
27%	Limited budgetary resources
27%	Limiting control and access to the right people
26%	Disparate non-connected systems

37%

37% of respondents said employees saving content on shared- and personal drives presents the greatest challenge to their company's ability to manage content successfully.

Modernization processes have also affected businesses' ability to adequately analyze and manage data. Thirty-six percent of respondents said that the challenges of cloud migration had a significant effect on data management processes. Respondents also feel that retention of redundant and unnecessary data (34%) has posed additional threats to data management.

This is a direct effect of the continued use of outdated tools and practices that require employees to manually sift through and clear any redundant, obsolete, or trivial (ROT) data throughout their systems. With an estimated 2.5 quintillion bytes of data being generated daily worldwide, data management teams need help.

Many of the content management challenges IT teams face can be mitigated or eliminated entirely using the right content management solution. By leveraging this technology to modernize content processes, employers can provide IT teams with greater data visibility and implement innovative techniques and automation to streamline content maintenance, storage, and removal efforts.

Creating Responsiveness and Resilience with Content Services

Businesses must empower their employees with modernized content management operations that are responsive and resilient in today's volatile, highly regulated, and complex markets. When it comes to overseeing digital economic content, the safety of valuable and sensitive company information is still the business's biggest driver when choosing a content management solution. Nearly two-thirds (60%) of participants found content and system security to be the most important feature of a content management system. Over half of the respondents also found data classification and categorization (53%) and analytics and reporting (54%) to be important features in a content solution.

The inability to properly monitor and remove excess data lead to notable and costly consequences, including:

Longer Load Times:
Not only does redundant copy require companies to increase database size, but data overloading can also slow software load times and disrupt operations

Higher Costs:
Increased storage for redundant data leads to increased costs, in addition to any extra overhead or resources needed to manage the data
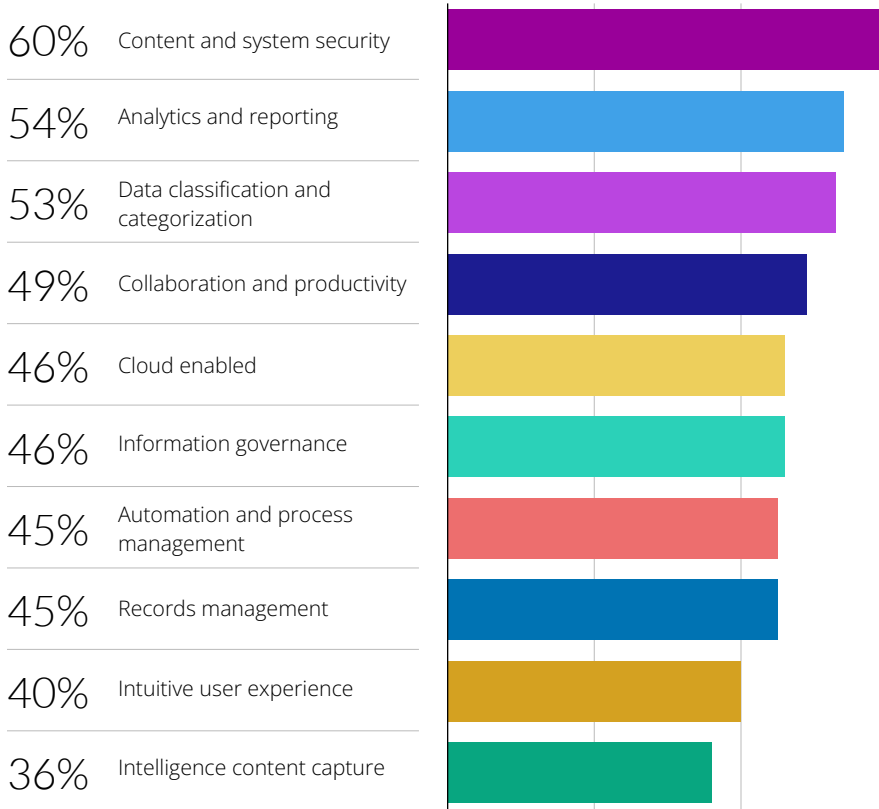
Data Discrepancies:
Storing data in multiple locations can cause confusion and lead to missing records or incorrect values if each piece of data is not updated

Corruption:
Storing multiple copies of the same data increases the potential for errors in writing, reading, storage, or the processing of data—leaving organizations at greater risk of regulatory infractions

What are the most important features in a content management system?
(All respondents)

|	
60%	Content and system security
54%	Analytics and reporting
53%	Data classification and categorization
49%	Collaboration and productivity
46%	Cloud enabled
46%	Information governance
45%	Automation and process management
45%	Records management
40%	Intuitive user experience
36%	Intelligence content capture

So, in the battle to keep up with complex digital economic content, organizations are looking to lean more heavily on content management tools to help secure, organize, and process their content. In doing so, businesses hope to achieve greater productivity and control over their information. When asked what factors played the most prominent role in their company's decision to bring in content management software, employee productivity (37%) topped the list among respondents. This was followed by records management (22%) and document management (19%).
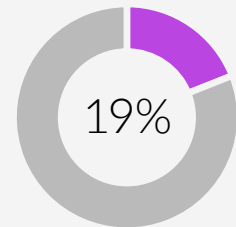
What factors played the most prominent role in their company's decision to bring in content management software
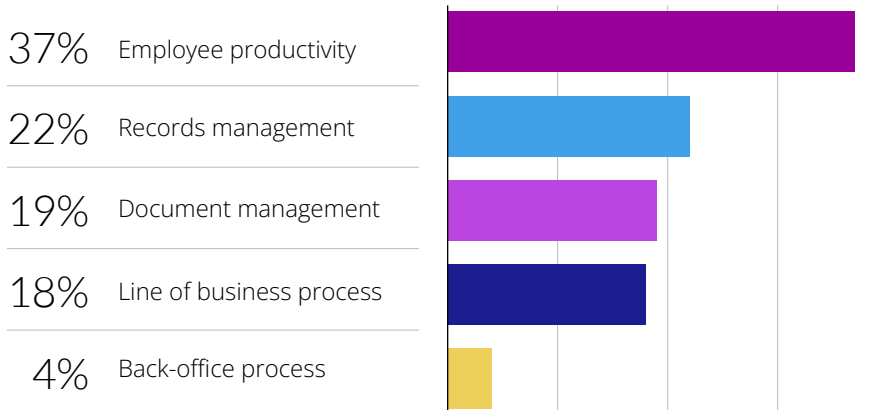
37%
Employee productivity

22%
Records management
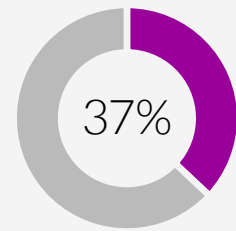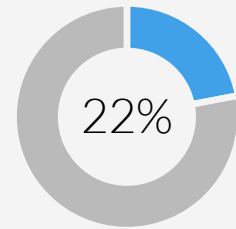
19%
Document management

What is the single most important factor in your Content Services decision?
(All respondents)

37%	Employee productivity	
22%	Records management	
19%	Document management	
18%	Line of business process	
4%	Back-office process	

The importance of employee efficiency did vary based on location and business size. A significantly higher number of respondents from the U.S. listed employee productivity (42%) as the single most important factor in their content services decision compared to just 30% of U.K. respondents and 28% from the APAC. Respondents working for larger enterprises also believe that improving employee productivity was the driving motivation for content management solutions, with 44% of participants working within companies with 1,000-4,999 employees stating that employee productivity was the single most important factor.

The Importance of Content Governance to Business Success

With the growing amount and complexity of digital content, the ability to govern content successfully and efficiently will be key to business success, which is why digital transformation appears to be a necessity in the eyes of most businesses, with 85% of respondents saying that digital transformation is extremely or very important to their organization. The vast majority of respondents also agreed that their business's digital transformation efforts were primarily focused on IT processes (84%), followed by efforts to improve customer service (45%) and finance/accounting (36%).

How Content Management Solutions Improve Employee Productivity

Greater Accessibility:
Modern content services allow users to access operations via web and mobile from anywhere and at any time

Facilitated Collaboration:
Content solutions are able to integrate with popular collaborative tools to streamline collaborative efforts and eliminate information silos
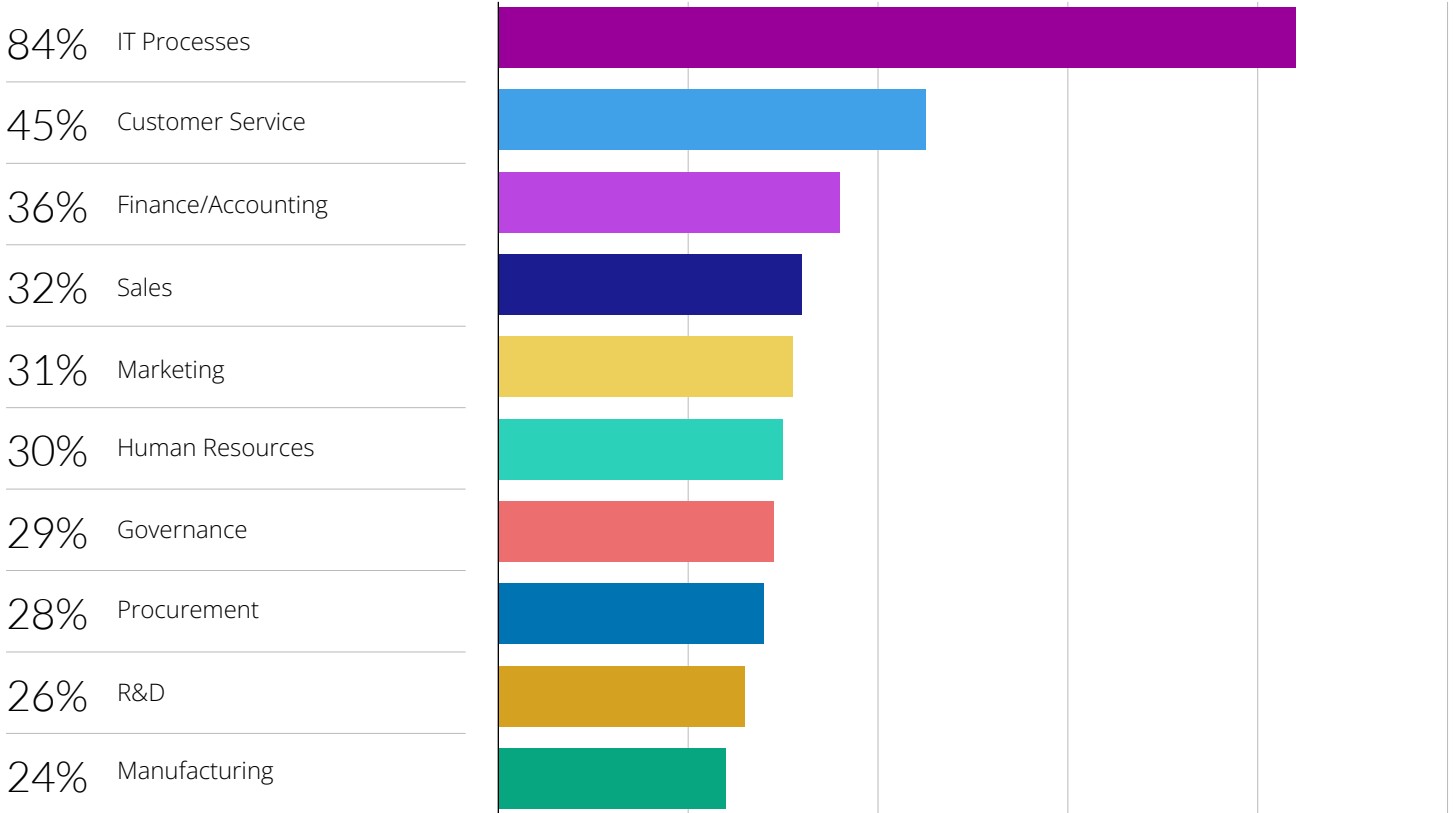
Integrated Automation:
Businesses can eliminate time-consuming manual methods by automating many of their content-rich processes, reducing workloads and vulnerability

Improved Visibility:
Organizations can integrate content service software with their tech stack to give users a unified view of their end-to-end data management systems

# Where are your organization's Digital Transformation efforts focused?
(All respondents)

Percentage	Category
84%	IT Processes
45%	Customer Service
36%	Finance/Accounting
32%	Sales
31%	Marketing
30%	Human Resources
29%	Governance
28%	Procurement
26%	R&D
24%	Manufacturing

Since the introduction of notable data privacy and human rights acts, like the General Data Protection Regulation (GDPR) and the California Consumer Privacy Act (CCPA), and with more and more privacy regulations continuing to develop worldwide, corporate data governance has become increasingly more challenging to manage. While innovative technologies that automate and streamline content governance exist, they are still unavailable or not apparent in many business operations. Three-quarters of respondents believe their company would gain an extremely (25%) or very significant (51%) competitive advantage if the current processes relating to information security and compliance could be automated, including the management of the data associated with these processes. A staggering 81% of respondents from organizations with 1,000-4,999 employees said their company would have an extremely or very significant advantage, higher than any other organizational size.

How significant of a competitive advantage, if any, would your organization gain if the current processes relating to information security and compliance could be automated, including the management of the data associated with these processes?
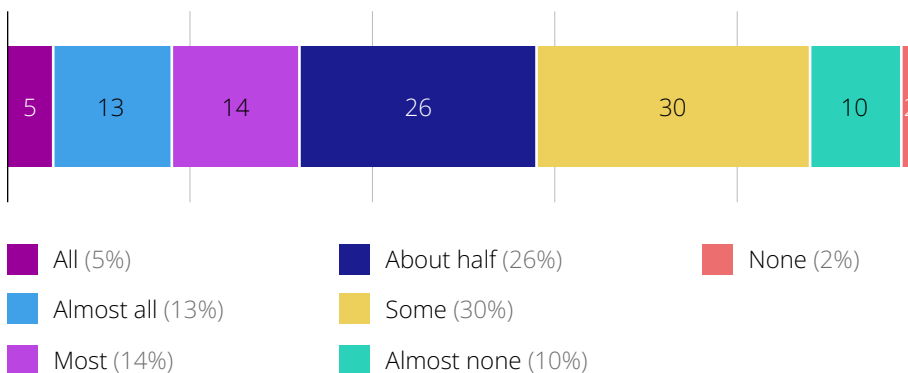
(All respondents)

25% Extremely significant	
51% Very significant	
20% Somewhat significant	
3% Hardly significant	
1% Not at all significant	
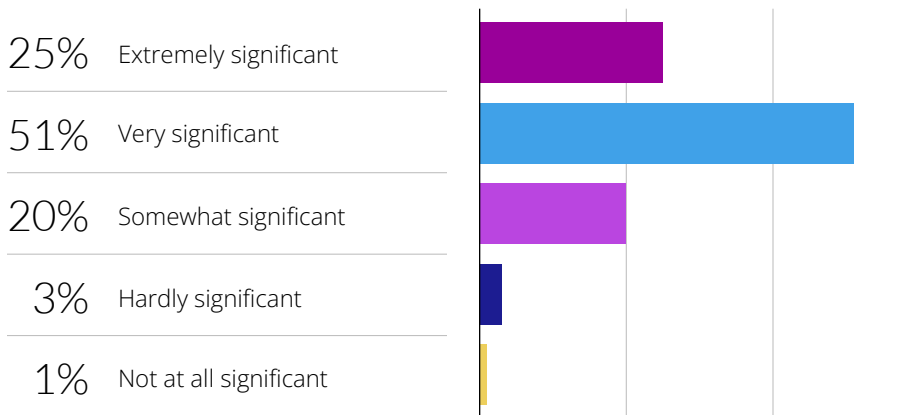
With a large chunk of today's business data coming in the form of unstructured data, perhaps the greatest advantage businesses can gain over their competition is the ability to harness and utilize their unstructured content. Eighteen percent of respondents admitted that all or almost all of their organization's data is unstructured.

What extent of your data is unstructured?

(All respondents)

5	13	14	26	30	10	2

- All (5%)
- Almost all (13%)
- Most (14%)
- About half (26%)
- Some (30%)
- Almost none (10%)
- None (2%)

These numbers jump substantially with respondents in the finance and insurance industry, with 28% noting all or almost all of their company's data was unstructured.

Organizations and their employees realize the issues stemming from data governance, especially with ongoing changes to already complex regulatory policies. However, while innovative technologies to automate and streamline content governance exist, they still seem unavailable or not apparent in many business operations. Seventy-six percent of respondents believe their company would have an extremely or very significant competitive advantage if it automated its security and compliance processes.

What extent of your data is unstructured?
(All respondents–based on participants' company's industry)

Legend: Finance / insurance · IT · Manufacturing · Other

Category	Finance / insurance	IT	Manufacturing	Other
All	2	1	7	7
Almost all	8	12	13	21
Most	15	16	16	9
About half	24	27	26	19
Some	38	29	28	37
Almost none	12	14	7	4
None	2	1	4	4

28%
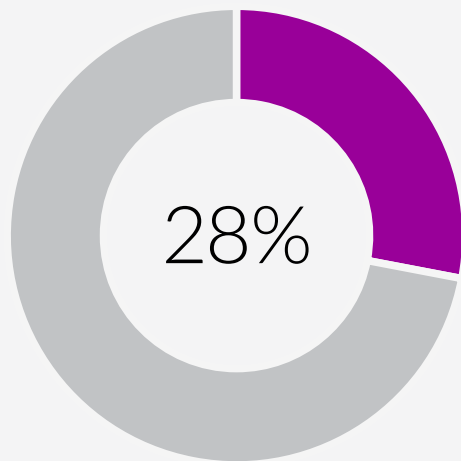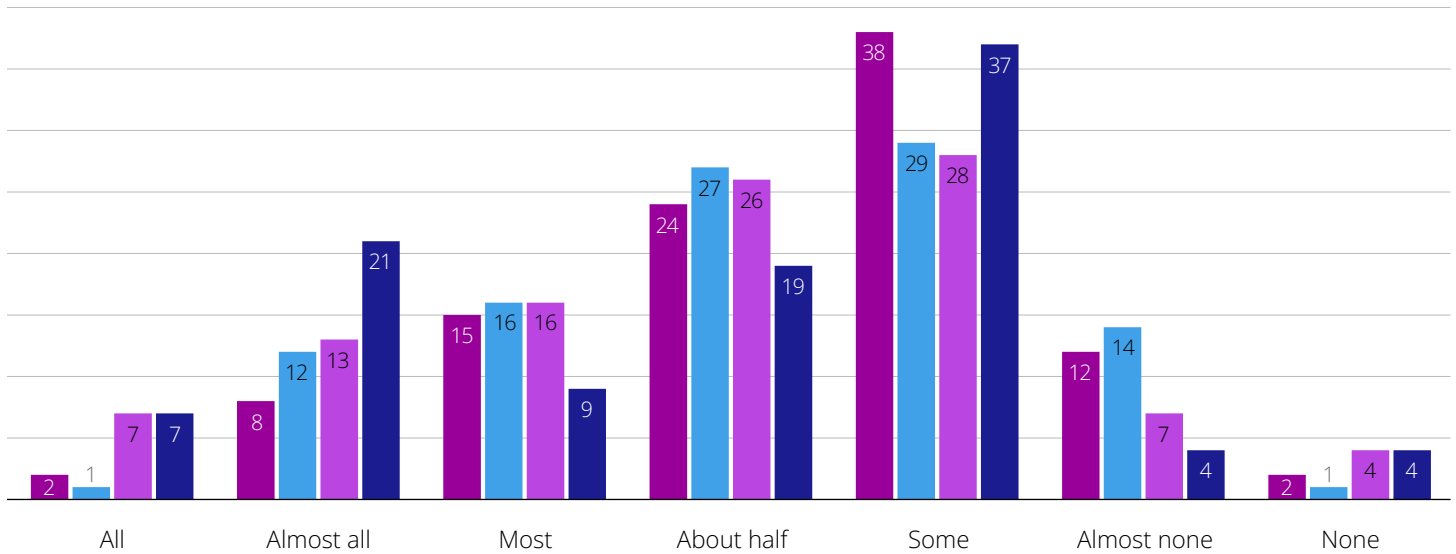
28% of respondents in the finance and insurance industry stated that all or almost all of their organization's data was unstructured.

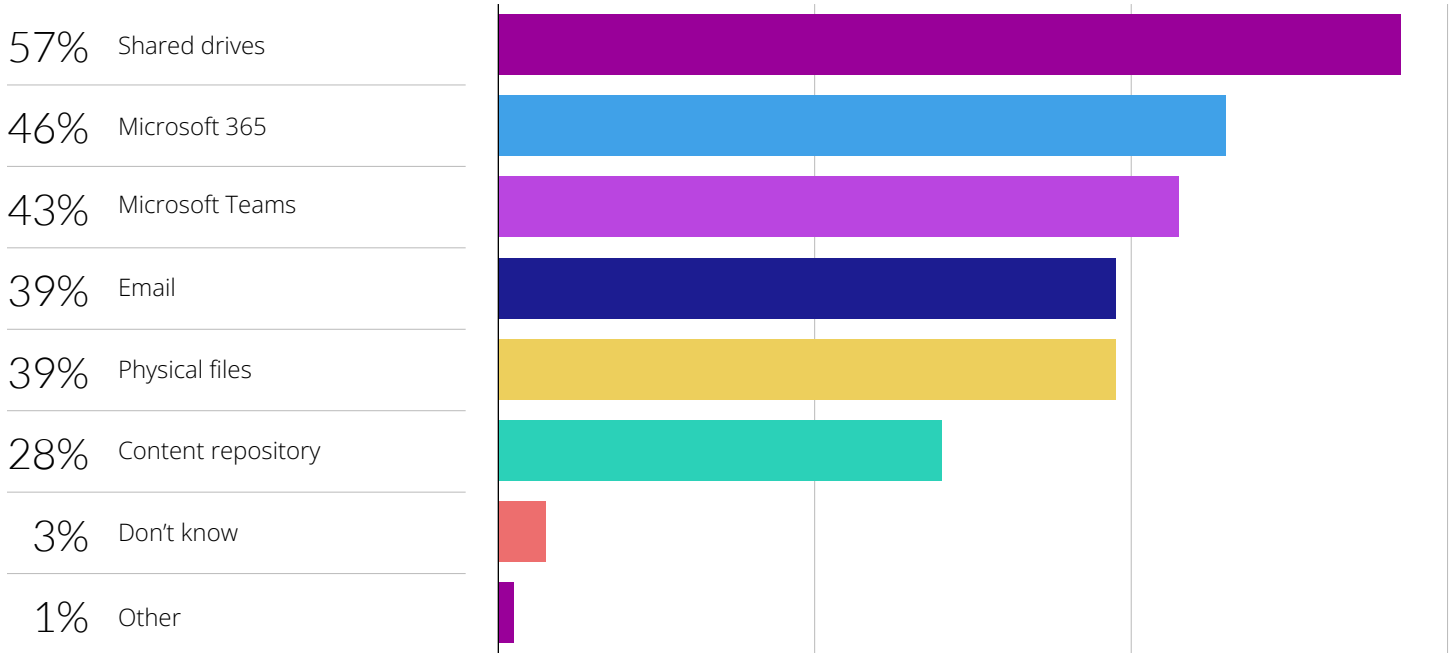Organizations aren't numb to the fact that unstructured data is valuable. Fifty-nine percent of respondents say the value their organization derives from its unstructured data and content is extremely or very significantly valuable. What makes it so difficult for businesses to get the most out of their unstructured content is that it is often difficult to locate. In most organizations' operations, employees work and save data on multiple technologies. A majority of respondents say their organization's unstructured data and content live on shared drives (57%), with a large amount on Microsoft 365 (46%) and Microsoft Teams (43%) collaboration tools.

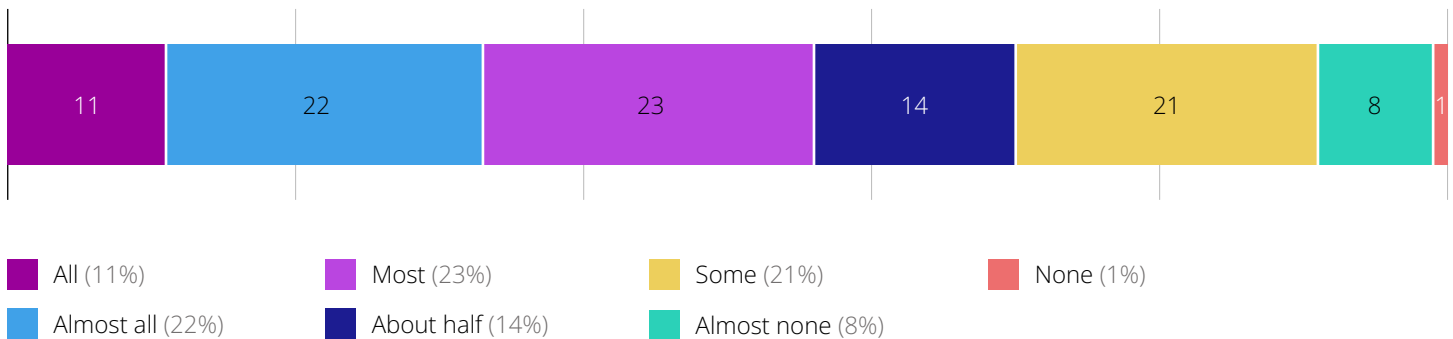## To your knowledge, where does your content/unstructured data live?
(All respondents)

57%	Shared drives	
46%	Microsoft 365	
43%	Microsoft Teams	
39%	Email	
39%	Physical files	
28%	Content repository	
3%	Don't know	
1%	Other	

With so much unstructured data living in multiple environments in organizations, companies are struggling to maintain governance over all their content and data. While the IT industry seems to have a better grasp of the governance of their unstructured data—with 39% of respondents working within the IT industry stating all or almost all of their unstructured content and data is governed—overall, only a third (33%) of respondents felt all or almost all of their organization's unstructured content and data is governed.

How much of your unstructured data / content is governed?
(All respondents)

All	Almost all	Most	About half	Some	Almost none	None
11	22	23	14	21	8	1

- ■ All (11%)
- ■ Almost all (22%)
- ■ Most (23%)
- ■ About half (14%)
- ■ Some (21%)
- ■ Almost none (8%)
- ■ None (1%)
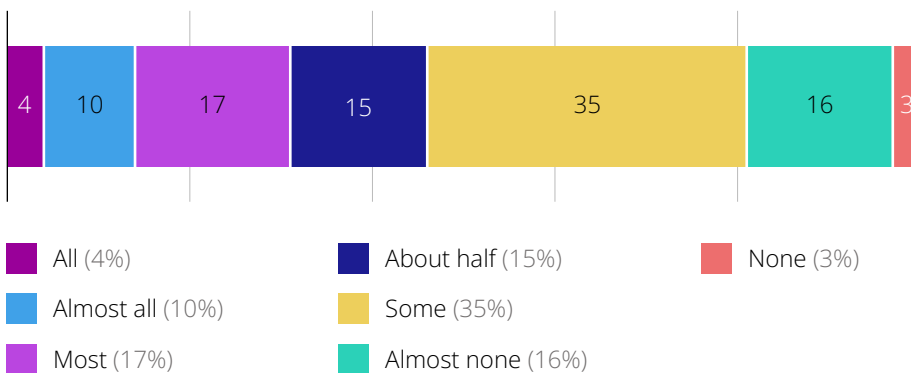
Over three-quarters (81%) of respondents indicated that at least some of their data is considered "dark." Dark data is data that is retrieved, processed, and stored but never used by a company.

Dark data is data an organization collects, processes and stores, but generally fails to use /derive insights for decision-making. What percentage of unstructured data/ content in your organization do you think is "dark"?
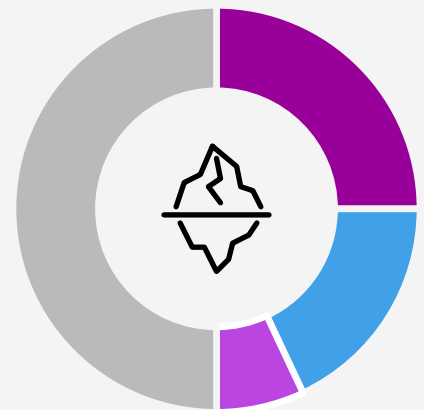(All respondents)

4	10	17	15	35	16	3

- ■ All (4%)
- ■ Almost all (10%)
- ■ Most (17%)
- ■ About half (15%)
- ■ Some (35%)
- ■ Almost none (16%)
- ■ None (3%)

The amount of dark data living within finance and insurance industries is alarming, with 25% of finance and insurance industry respondents saying all or almost all of their data is dark compared to only 18% of IT and 7% of manufacturing respondents.

The Lasting Impact of the Pandemic

In early 2020, the Covid-19 pandemic sent shockwaves throughout the business world. Countless lockdowns and new and evolving regulations forced organizations to adapt quickly. Businesses accelerated modernization efforts in order to remain functioning and adopted new business models—like remote and hybrid working. These new working models meant companies needed to make operations more readily available to employees, including content management processes.
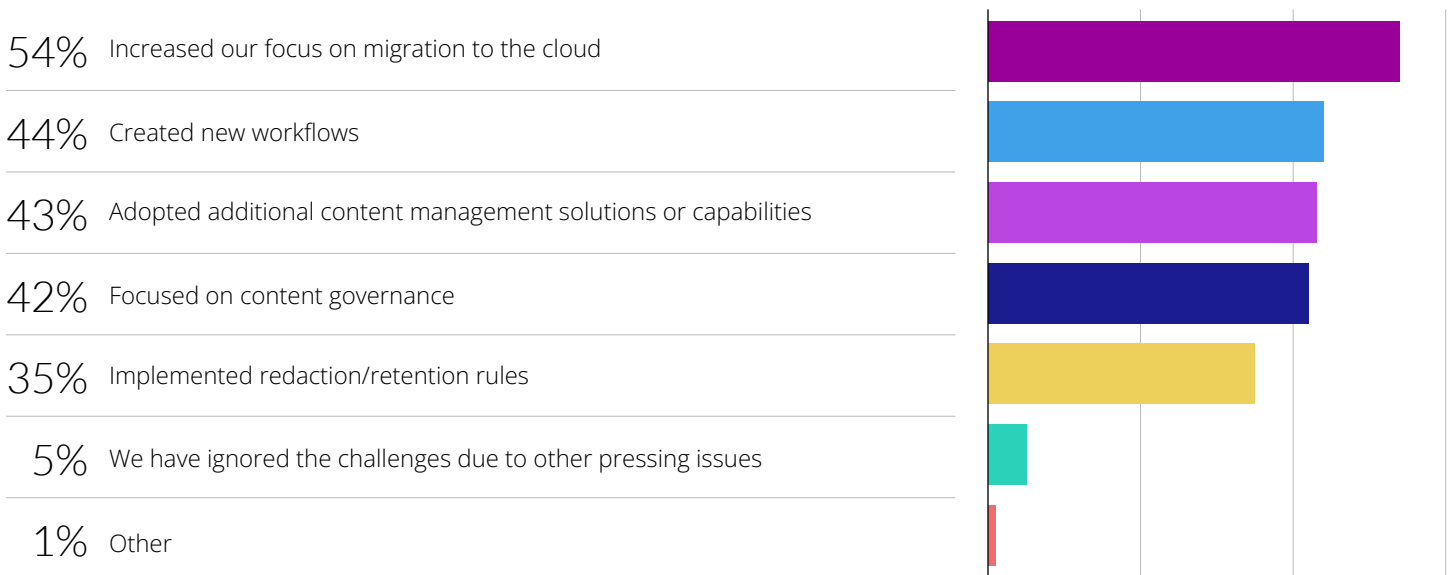

25% of respondents from the finance and insurance industries believe all or almost all their data is dark compared to only 18% of IT and 7% of manufacturing respondents.

When asked how their organization responded to content management challenges brought on by the pandemic, more than half of the respondents stated that their company increased its focus on migrating to the cloud (54%). While getting employees connected to business operations appeared to be organizations' biggest priority, respondents noted an increased focus on creating new workflows (44%) that better aligned with remote working models. In addition, 43% of respondents' organizations emphasized content management needs and adopted additional content services.

How did your organization respond to content management challenges brought on by the pandemic and remote work?

(All respondents)

54%	Increased our focus on migration to the cloud
44%	Created new workflows
43%	Adopted additional content management solutions or capabilities
42%	Focused on content governance
35%	Implemented redaction/retention rules
5%	We have ignored the challenges due to other pressing issues
1%	Other

In response to the pandemic, 54% of respondents' organizations increased their focus on migrating to the cloud.

While the pandemic was a catalyst for digital transformation, the movement to remote working and digital operations is here to stay. And, it appears, along with cloud migration, many organizations are prioritizing the modernization of their content management processes to remain relevant and compliant in today's markets.

The Mainframe *IS* Modern

While cloud migration has become a popular movement, organizations across all industries seem keen on continuing to leverage the benefits of their mainframe technology. For a highly regulated enterprise, the IT infrastructure supporting its content is equally as important as the content itself. Powerful IT environments and successful content management go hand-in-hand, which is why hybrid infrastructure has become popular among organizations. Seventy-four percent of respondents stated that their organization's content resides both on-premises and in the cloud.

Where does your content reside?

(All respondents)

13%
In the cloud only

74%
Both on premise
and in the cloud

13%
On premise
only
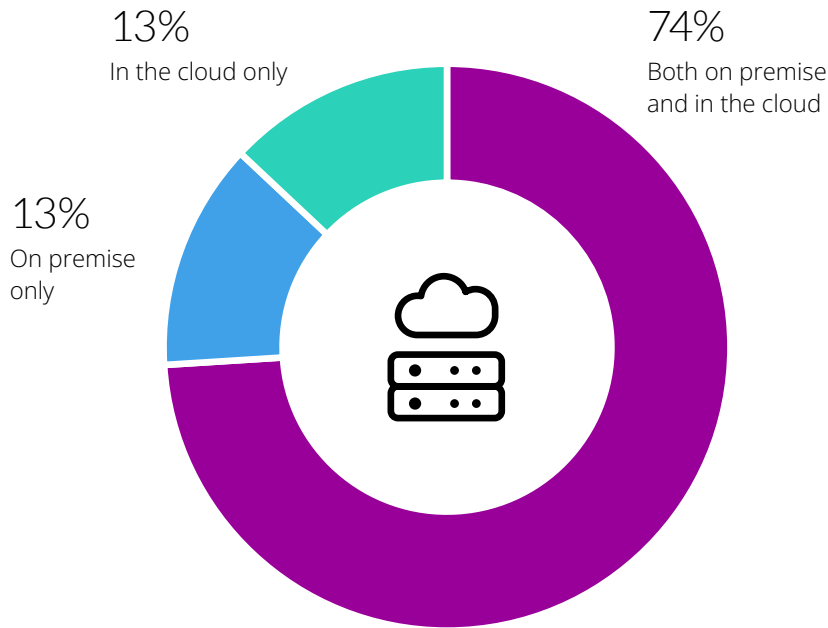
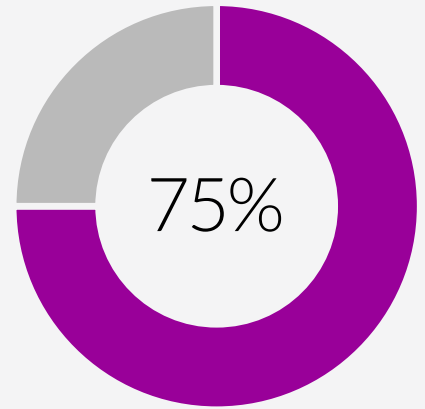And, 75% of respondents noted that their company's content management tools work both on premise and in the cloud.

Where do your content management tools work?

(All respondents)

12%
In the cloud only

75%
Both on premise
and in the cloud

13%
On premise
only
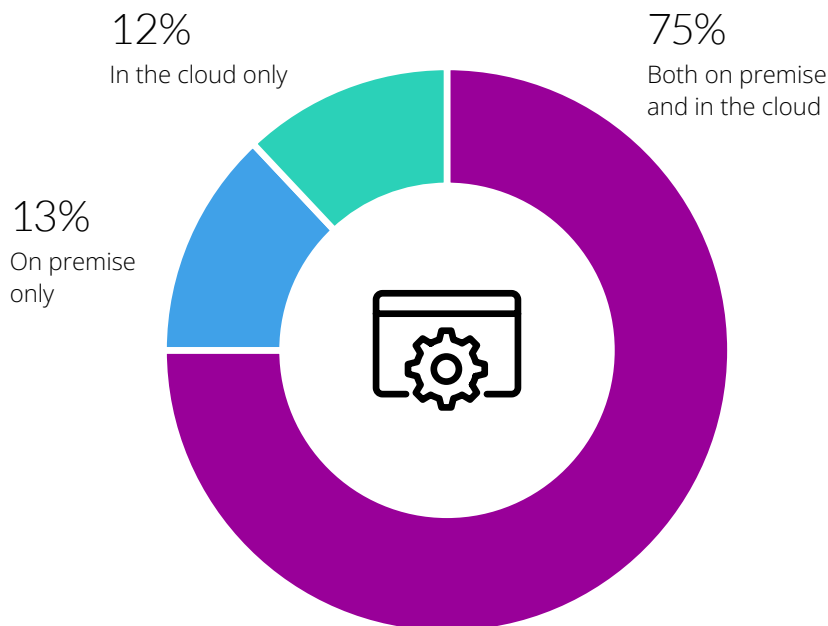
Base: 508 (92% of respondents)

75%

75% of respondents say their organization's content management tools are compatible with both on-premises and cloud technology.
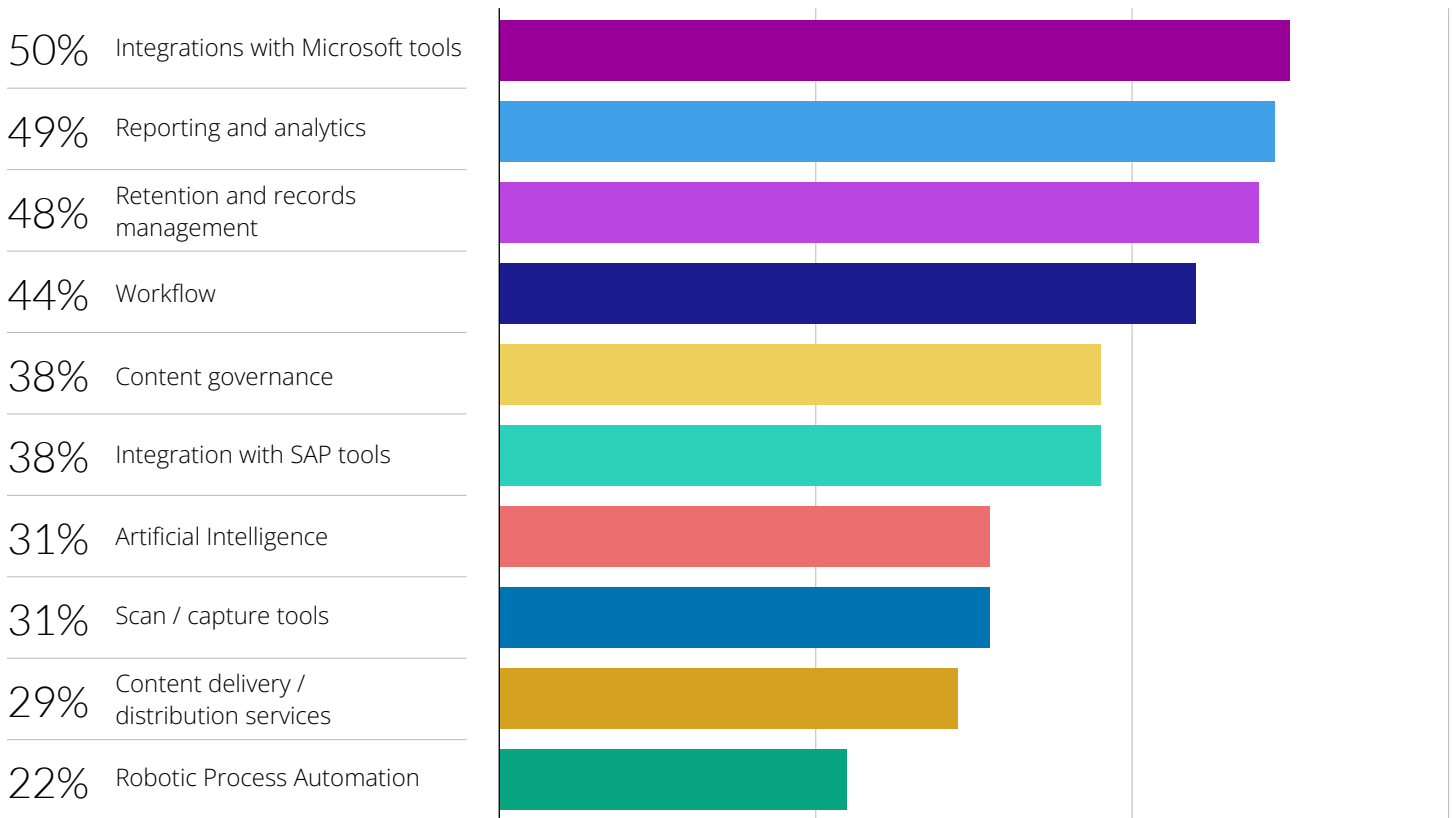
Which Content Management Processes and Tools Are Organizations Using?

When it comes to leveraging content management software to improve data governance, businesses have looked to simplify processes by integrating collaboration tools and modernizing how they analyze and prioritize their content.

Fifty percent of respondents' companies have made efforts to integrate content management software with Microsoft tools to make all data, including unstructured data, more accessible and easier to govern. This was closely followed by the introduction of reporting and analytics tools (49%) and retention and records management software (48%) to improve content teams' ability to quickly determine valuable data and store or do away with unneeded data. These findings highlighted the importance of content solutions' connectivity with popular collaboration tools and shared drives and the tools' ability to provide automated features to streamline data analytics and assist in the efforts to do away with ROT content and data.

What content management processes or tools does your organization currently have in practice?

(All respondents)

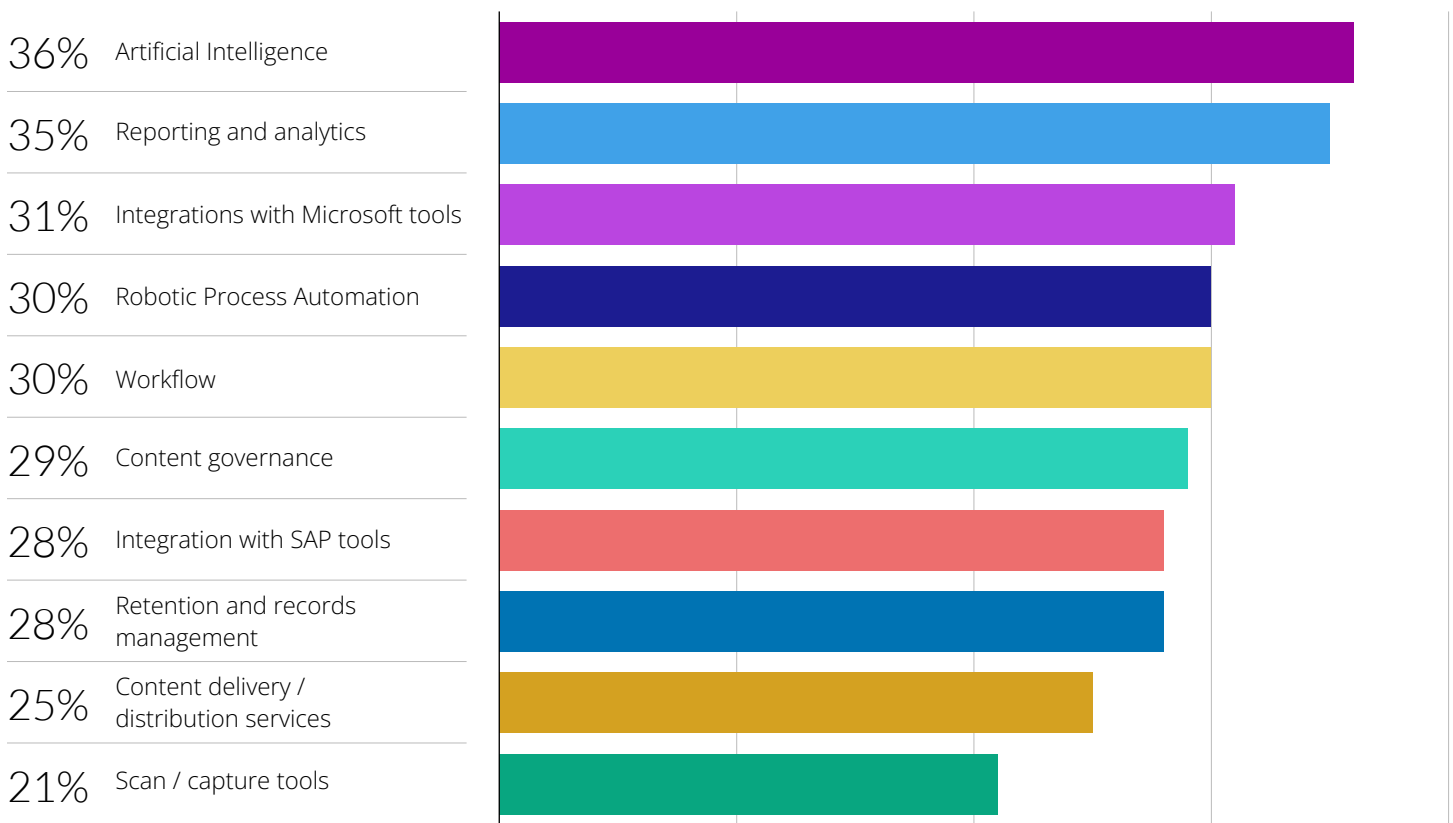|		
50%	Integrations with Microsoft tools	
49%	Reporting and analytics	
48%	Retention and records management	
44%	Workflow	
38%	Content governance	
38%	Integration with SAP tools	
31%	Artificial Intelligence	
31%	Scan / capture tools	
29%	Content delivery / distribution services	
22%	Robotic Process Automation	

Moving forward, organizations plan to continue to invest in content management processes and tools. When asked which content management processes and tools respondents' organizations plan to put in place in the next 18 months, respondents said their companies would continue to focus on reporting and analytics (35%) and integrations with Microsoft tools (31%). However, the top answer from respondents was that their organization would look to increase their use of artificial intelligence (AI) technology (36%). The manufacturing industry is leading the way with AI adoption, with 33% of respondents saying AI will be implemented in the next 18 months.

What content management processes or tools does your organization plan to put in place in the next 18 months, if any?

(All respondents)

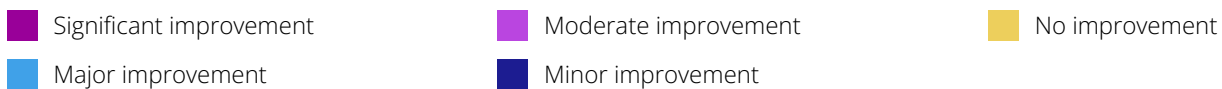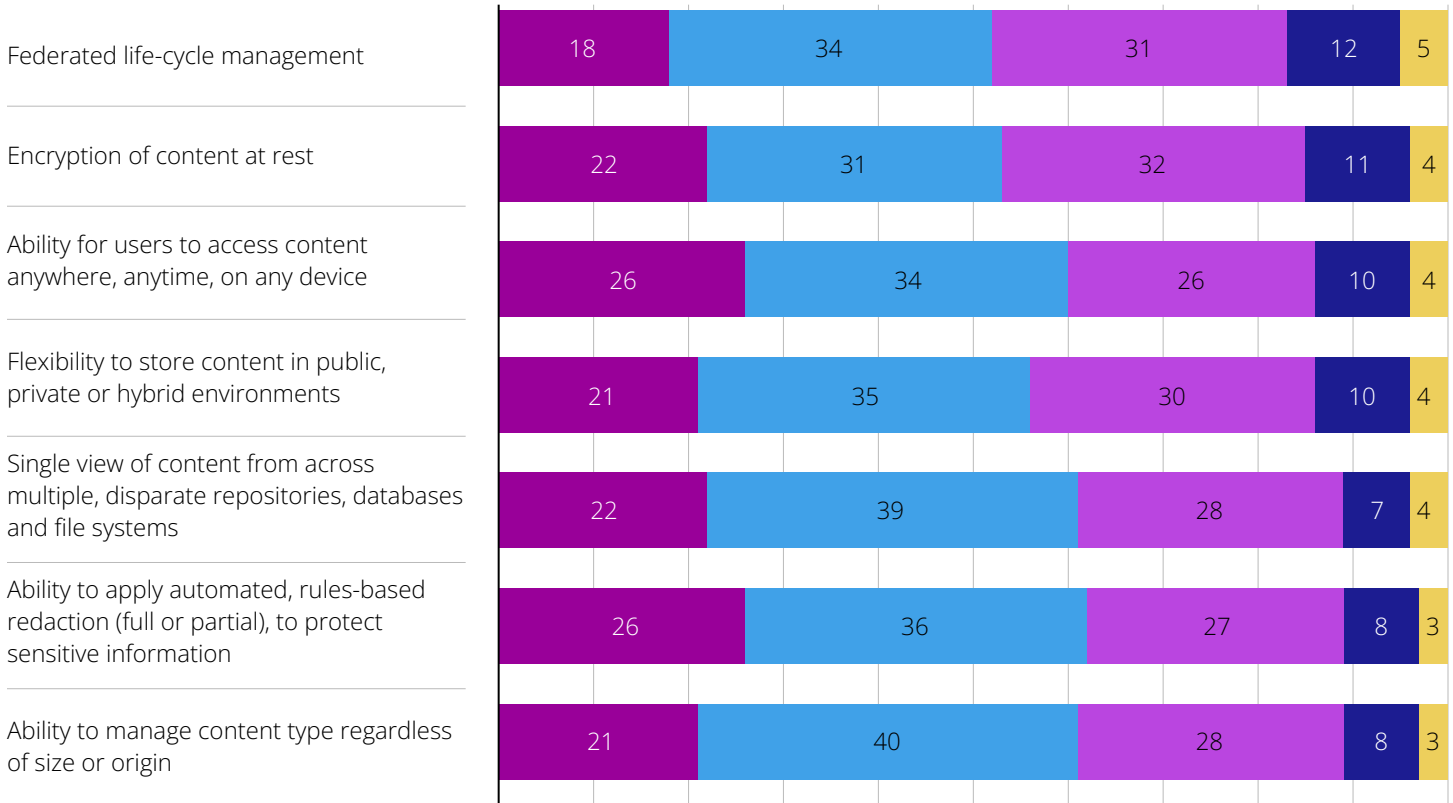|	
36%	Artificial Intelligence
35%	Reporting and analytics
31%	Integrations with Microsoft tools
30%	Robotic Process Automation
30%	Workflow
29%	Content governance
28%	Integration with SAP tools
28%	Retention and records management
25%	Content delivery / distribution services
21%	Scan / capture tools

While it is clear businesses are looking to increase productivity and improve their bottom line, what advantages do IT professionals want from content management modernization?

Luckily, data suggests the wants of IT professionals align with what organizations have done and plan to do moving forward. Nearly two-thirds (62%) of respondents felt the ability to apply automation and rules-based redaction (full or partial) to protect sensitive data work provides significant or major improvements to content management efforts. This was followed by the ability to manage content types regardless of size or origin (61%), having a single view of content from across multiple, disparate repositories, databases and file systems (61%), and the ability to access content anywhere, anytime on any device (60%).

How much of an improvement would each of the following make on the ease with which your organization manages content?

(All respondents)

	Significant improvement	Major improvement	Moderate improvement	Minor improvement	No improvement
Federated life-cycle management	18	34	31	12	5
Encryption of content at rest	22	31	32	11	4
Ability for users to access content anywhere, anytime, on any device	26	34	26	10	4
Flexibility to store content in public, private or hybrid environments	21	35	30	10	4
Single view of content from across multiple, disparate repositories, databases and file systems	22	39	28	7	4
Ability to apply automated, rules-based redaction (full or partial), to protect sensitive information	26	36	27	8	3
Ability to manage content type regardless of size or origin	21	40	28	8	3

Legend:
- Significant improvement
- Major improvement
- Moderate improvement
- Minor improvement
- No improvement

In conclusion, IT professionals want content management tools that automate and simplify the protection of sensitive data, let them manage content more efficiently and effectively, provide a unified view of all content repositories and databases, and make content management operations more accessible. Thus, organizations' movement towards cloud migration, the introduction of highly integrative content software, and the drive to implement more AI technology into operations appear to be in the best interest of their employees.
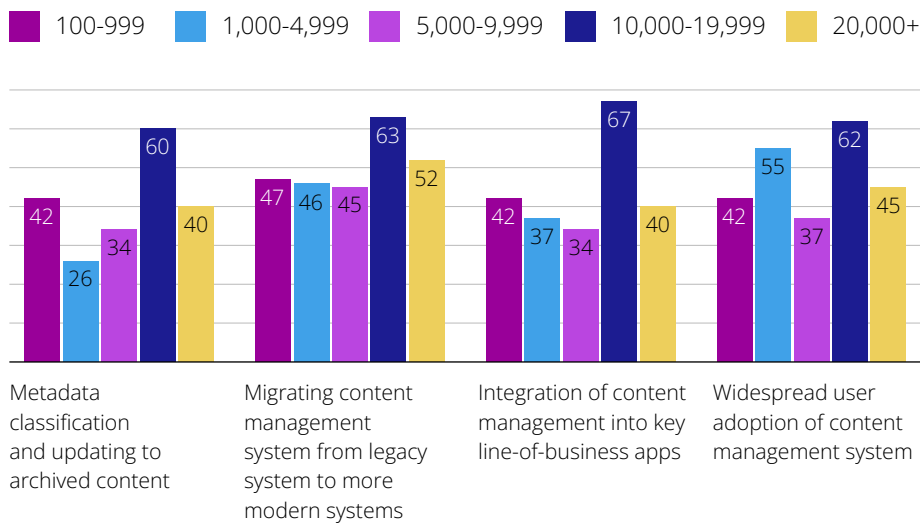
Restoring Optimism With Content Services

Larger organizations usually handle a little bit more of, well, everything. They must manage more data, along with more business applications—all while adhering to more regulations based on global reach. All of these lead to greater vulnerability to security breaches, lost data, and regulatory infractions. This can all seem overwhelming to IT professionals in charge of managing content for large businesses.
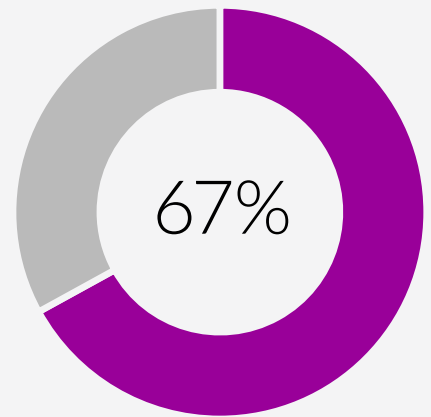
Respondents in organizations with 1,000-4,999 employees cited they are extremely or very concerned about their content management tools integration capabilities with other business applications (67%), migrating content management software from legacy systems to more modern systems (63%), managing the widespread user adoption of content management systems (62%) and metadata classification, and updating to archived content (60%).

How much of an improvement would each of the following make on the ease with which your organization manages content?

(All respondents – based on participant's company size)

Legend:
- 100-999
- 1,000-4,999
- 5,000-9,999
- 10,000-19,999
- 20,000+

Metadata classification and updating to archived content	Migrating content management system from legacy system to more modern systems	Integration of content management into key line-of-business apps	Widespread user adoption of content management system
42, 26, 34, 60, 40	47, 46, 45, 63, 52	42, 37, 34, 67, 40	42, 55, 37, 62, 45

Although these are reasonable concerns, businesses can make efforts to mitigate their employees' fears moving forward with content services. By leveraging content management solutions that integrate with popular business applications and tools, like Microsoft and SAP, and intuitive, user-friendly platforms, organizations can alleviate many of the pains that come with software migration, integration, and employee adoption. And, businesses that modernize data management can simplify and streamline metadata classifications and records management efforts using automation.

67%

67% of respondents in organizations with 1,000-4,999 employees are extremely or very concerned about content management technologies' connectivity with business applications.

Regional Differences

Though responses among U.S. and U.K. respondents remained relatively similar, there were some glaring differences among responses from APAC participants. APAC respondents had more significant concerns about several aspects of content management adoption and processes.

This included:

- Metadata classification and updating to archived content
- Migrating content management systems from legacy systems to more modern systems
- Integration of content management into similar business applications
- Widespread user adoption of content management systems

How concerned are you about each of the following as issues for your organization?
(All respondents)

■ US ■ UK ■ APAC

	US	UK	APAC
Metadata classification and updating to archived content	56	31	46
Migrating content management system from legacy system to more modern systems	62	44	54
Integration of content management into key line-of-business apps	65	33	47
Widespread user adoption of content management system	61	35	52
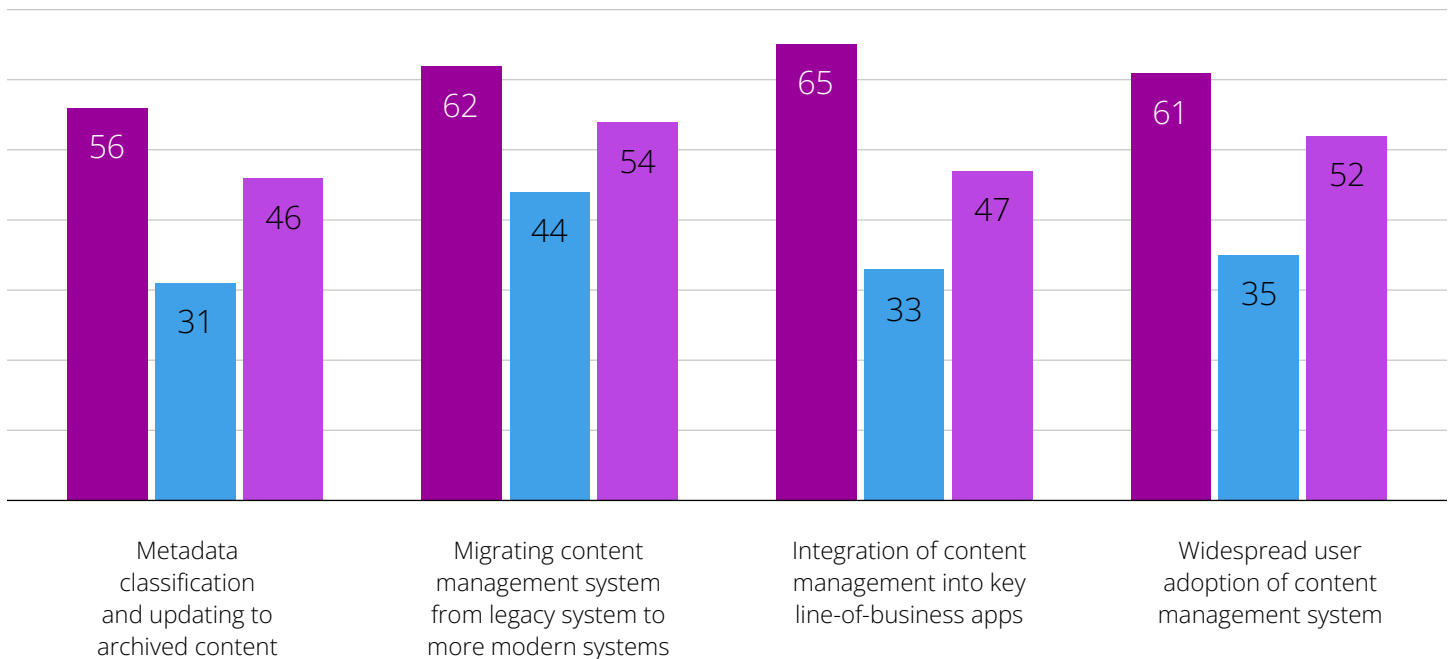
Building a Secure Data Foundation for Tomorrow

The movement toward operational modernization and digital transformation is not slowing down. To achieve true modernization, organizations must also adopt modern technologies and tools to manage their content efforts. The digital economy is only getting more complex. Moving forward, businesses will continue to deal with stringent compliance regulations, the growing adoption of remote working, and increasing customer demands for faster service. Organizations must implement tools and practices into their operations that enable them to leverage all the content they have available to them to gain a competitive advantage in today's fast-paced, digital world. By utilizing content management software, businesses can provide IT professionals with an unparalleled overview of a company's entire content system and reduce human activity with automation capabilities. With an end-to-end overview of data management and the ability to streamline content analysis and repository cleanups, organizations will ensure they remain fully compliant, well-governed, highly performing, and resilient while getting the most from their content.

While there are obvious barriers to achieving an optimized content system—such as content sprawl, dark and unstructured data, and ungoverned content—content management solutions address and eliminate many of the challenges enterprises face. Whether businesses work within cloud, mainframe, or hybrid ecosystems, highly integrative content management systems allow teams to bring their entire content process together and connect popular collaborative tools and shared drives to further rein in scattered and unstructured content. Enterprises that embrace modern tools and strategies for using, processing, storing, and governing content will gain an edge over their competition and lay the foundation for continued success in today's digitalized world.

Methodology

Rocket Software partnered with independent research firm Researchscape to survey 553 business professionals from the United States, United Kingdom, and Asia-Pacific regions, working within medium-sized businesses (100-999 employees) to large enterprises (20,000+ employees). The survey was conducted between July 19, 2022, and August 7, 2022, and focused on the opinions of IT professionals working with content management software.

About Rocket Software

Rocket Software partners with the largest Fortune 1000 organizations to solve their most complex IT challenges across Applications, Data and Infrastructure. Rocket Software brings customers from where they are in their modernization journey to where they want to be by architecting innovative solutions that deliver next-generation experiences. Over 10 million global IT and business professionals trust Rocket Software to deliver solutions that improve responsiveness to change and optimize workloads. Rocket Software enables organizations to modernize in place with a hybrid cloud strategy to protect investment, decrease risk and reduce time to value. Rocket Software is a privately held U.S. corporation headquartered in the Boston area with centers of excellence strategically located throughout North America, Europe, Asia and Australia. Rocket Software is a portfolio company of Bain Capital Private Equity. Follow Rocket Software on LinkedIn and Twitter.

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