State of the Market: Microsoft SharePoint

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About the Research
As the non-profit association dedicated to nurturing, growing and supporting the ECM (Enterprise Content Management) community, AIIM is proud to provide this research at no charge. In this way, the education, thought leadership and direction provided by our work can be leveraged by the entire community.

Please feel free to share this document with a friend or colleague.

Process Used and Survey Demographics
The results of the survey and the market commentary made in this report are independent of any bias from the vendor community.

AIIM used two main sources to construct this report. The first was the accumulated experience and ongoing market analysis work performed by Carl Frappaolo. The second was a survey administered by Frappaolo and taken by 616 individual AIIM members between November 17 and November 29, 2008.

Survey population demographics can be found in the Appendix.
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Microsoft SharePoint has captured the ECM market’s attention. While some may argue that SharePoint is not a panacea and is perhaps being over-used, many organizations around the world are reportedly using it for one or more ECM-related projects.

In fact, it is likely, based on the market data that is the focus of this white paper, that someone in your organization is using SharePoint—perhaps even you. But among this market fervor, there is still confusion regarding the depth and breadth by which SharePoint can have impact on the organization.

Can it be successfully deployed enterprise-wide? Is it best suited for particular applications, or capable of addressing all of an enterprise’s content management needs? Does it have particular functional strengths and weaknesses?

Answers to these and many other questions were the focus of a recent survey conducted by AIIM and Information Architected. The survey was sent in November 2008 to approximately 2,000 AIIM members, yielding 616 responses. Collectively, these responses shed light on the reality of SharePoint adoption and practice within the enterprise. (See the Appendix for more detail on the administration of the survey and the survey population demographics.)
Broad but Shallow Penetration within the Enterprise

Microsoft claimed $1 billion in revenue from sales of SharePoint in 2007 alone. Survey data suggests that SharePoint is indeed rapidly becoming pervasive within the enterprise.

When asked to identify whether their respective organization was or had used SharePoint in a production capacity, 69% of survey respondents indicated that they had and were still using SharePoint in production mode. (See Figure 1.)

It is equally important to note that among the 31% of respondents who reported not having used SharePoint, 45% indicated that “they had not gotten around to it yet, but likely will.” Thus, 83% of the organizations surveyed either currently use, or likely will be using SharePoint. (See Figure 2.)

Figure 1. Does/Did Your Organization Deploy SharePoint in a Production Capacity? (i.e. Deployment is Recognized/Endorsed by IT and/or Business Management.)

- Yes, and it is still deployed in production: 67%
- Yes, we did but it is no longer deployed in production: 2%
- No, never have: 31%

Figure 2. Why Hasn’t Your Organization Used SharePoint?

- Have not gotten around to it yet, but likely will: 45%
- Don’t know: 20%
- User training and change management: 16%
- Technical issues (deployment/customization): 16%
- Integration with existing systems: 15%
- Developer training and tool set: 11%
- Scalability concerns: 10%
- Integration with 3rd-party systems: 8%
- Product immaturity: 8%
- Lacks features/functionality we need: 8%
- Security/control issues: 7%
- Product support concerns: 5%
- Preference for non-Microsoft solutions: 5%
- Partner/implementer support: 5%
**Security and Customization/Integration Behind Dissatisfaction**

A very low number (2%) of respondents’ organizations had used SharePoint but since stopped. While this percentage is statistically insignificant, the reasons these select few stopped using SharePoint are worth mentioning. (See Figure 3.)

First among these (40%) was “security/control issues.” Technical issues regarding deployment/customization and integration were the second most popular reasons, each cited by 30% of the respondents.

*It is again stressed that a small minority of users stopped using SharePoint.* But this is nonetheless an interesting response, as it reflects other key findings seen throughout the analysis of survey data. According to research data discussed in more detail later in this white paper, successful users of SharePoint do not view security and custom development and integration as among the product’s strengths, and say the latter two can also cause delayed implementations and cost overruns. (See Figures 17, 18 and 22.)

Meanwhile, the security concerns cited by respondents that stopped using SharePoint are likely why SharePoint applications are most often used within the protection of a firewall. (See Figures 12, 13 and 14.)

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**Figure 3. Why Did You Stop Using SharePoint?**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security/control issues</td>
<td>40%</td>
</tr>
<tr>
<td>Integration with existing systems</td>
<td>30%</td>
</tr>
<tr>
<td>Product immaturity</td>
<td>30%</td>
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<tr>
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<td>Don’t know</td>
<td>11%</td>
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<td>Product support concerns</td>
<td>10%</td>
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<td>Preference for non-Microsoft solutions</td>
<td>10%</td>
</tr>
<tr>
<td>User training and change management</td>
<td>10%</td>
</tr>
<tr>
<td>Partner/implementer support</td>
<td>0%</td>
</tr>
</tbody>
</table>
Speed of Implementation Yields Broad User Adoption
While most of the responding organizations are using SharePoint, the survey looked further to determine how widely it is being deployed.

Figure 4. Indicate the Scope and Level of Use of the SharePoint Applications in Your Organization.

Virtually all organizations that have deployed SharePoint in production mode—again, this is 69% of all survey respondents—have done so at least at the workgroup level. Sixty-five percent of respondents have completed deployment within workgroups. Most of these, 58% overall, have also deployed SharePoint with one or more individual departments. But multi-departmental and enterprise-wide deployment levels are lower, at 39% and 37% respectively.

This indicates that adoption of SharePoint within the enterprise is likely a grassroots effort that begins at the workgroup level, but then relatively rapidly, grows to include multi-departmental and enterprise-wide use.

We also base this conclusion on the fact that SharePoint is relatively new. Indeed, 58% of the surveyed organizations have been using SharePoint for two years or less. (See Figure 5.)

Figure 5. How Long Has Your Organization Been Using SharePoint?
Furthermore, more than 75% of respondents indicated that development and implementation of their production SharePoint deployment took one year or less. The largest component of that group (31%) said implementation took three to six months. (See Figure 6.)

Figure 6. How Long did the Development and Implementation of Your SharePoint Deployment Take?

The survey measured the scope of SharePoint deployments in various other ways, but none of these yielded such insightful results. For example, the number of users accessing SharePoint is a statistic that 13% of the respondents simply did not know. (See Figure 7.) Among those that did, the numbers reflect the general survey population, a mix across different organizational and work group sizes. See Appendix: Methodology Used and Survey Demographics for more detail.)

Figure 7. Approximately How Many Users Access SharePoint In your Organization?
Most individuals don’t know how many documents they have in SharePoint and many do not know the number of sites deployed, reflective of the general unmanaged nature of SharePoint deployments.

Similarly, 40% of respondents were simply unaware how many documents their SharePoint installations contain. (See Figure 8.)

**Figure 8. Approximately How Many Documents are Stored In your SharePoint Sites?**

While more respondents were aware of the number of SharePoint sites deployed, no clear trend emerged. Twenty-four percent have between 10 and 50 sites, while another 22% have fewer than 10 sites and 35% have 50 or more sites. (See Figure 9.)

**Figure 9. Approximately How Many SharePoint Sites are Deployed Within Your Organization?**
User Adoption is Broad, Functional Adoption Remains Focused on File Sharing

While SharePoint is used broadly across the organization, survey respondents indicate that SharePoint functionality is predominately used in a very limited fashion. None of the SharePoint functions are used as an enterprise standard to any significant degree. File-sharing, the genesis of SharePoint, is the only SharePoint functionality that has gained any real traction within organizations. Among survey respondents, 47% use file-sharing significantly and another 13% use it as an enterprise standard. (See Figure 10.)

The next most popularly used functions are search and collaboration, but in each case only 38% of the responding organizations use it in a significant or enterprise-standard manner. Also, it is likely that respondents are using SharePoint’s search function only to search SharePoint content.

At the opposite end of the functionality spectrum lie Digital Asset Management (DAM), complex workflow/BPM and records management. These are not being deployed by a majority of the surveyed organizations. (See Figure 10.)

Figure 10. Rank the Degree to Which Your Organization Uses the Following SharePoint Functionality.

Most SharePoint functionality is positioned as a component of an overall ECM deployment, and is likely complemented and augmented by other functional alternatives.

While most leverage the SharePoint file sharing and portal platform functionality, very few use its workflow/BPM, records management, DAM, and business forms.
**SharePoint Functionality—“Good Enough”**

Respondents’ satisfaction levels with various SharePoint functionalities are aligned with the features’ usage trends. No surprises here.

Interestingly, however, no single function received a strongly favorable ranking. This is particularly poignant because only those respondents who reported using the functionality to at least a “somewhat” level, were asked to rank their satisfaction with it. Thus, the survey filtered out any potential negative weighting from those who simply were unfamiliar or inexperienced with the particular functionality.

File sharing, search and collaboration received the highest rankings, but even in these cases, the greatest response was “very good,” not “excellent.” All other functionality, with one exception, was mostly ranked between “fair” and “good.” The only deviation came in regard to portal platform functionality, which ranked between “good” and “very good.” (See Figure 11).

**Figure 11. Rank Your Level of Satisfaction With the Following Functions in SharePoint.**

![Chart showing satisfaction levels for various SharePoint functions.](image)

**Component-based Deployment in Functionality Reflected in Business Process Usage**

SharePoint generally plays a minor role in support of business processes, a finding that reflects users’ overall tendency to position SharePoint functionality predominately as a “somewhat” used technology or a component to an overall ECM strategy.

SharePoint is most often used within an employee-facing Web site, with 47% of the organizations surveyed saying it plays a major role in such projects.

Meanwhile, SharePoint plays a more minor role in a host of other processes, including customer support, KM/collaboration and complex document authoring.

But SharePoint is not leveraged to any major degree for business intelligence, compliance, e-discovery, archival and preservation, and external-facing Web sites. (See Figure 12.)
The issue of using SharePoint in an external-facing Web site was directly addressed as well. Only 22% of survey respondents had already used SharePoint outside the firewall. But among the remainder, a positive attitude is prevalent. Nearly half of the total survey population, 47%, indicated that they plan on using SharePoint outside the firewall, while 31% said they would not. (See Figure 13.)

Among the 31% of the total survey population that would not use SharePoint outside the firewall, the majority, 53%, identified security as the main cause for concern. (See Figure 14.)

Currently the killer app is employee facing websites with knowledge management/collaboration close behind; but there is little to no leveraging of SharePoint in compliance, e-discovery, external website, complex authoring, and archival/preservation.
SharePoint Performance Varies by Use Case

Survey respondents predominately rank satisfaction with SharePoint performance for particular business processes as “good,” reflecting the aforementioned similar findings concerning overall satisfaction levels with SharePoint functionality. (See Figure 11.)

Again, only those survey respondents that indicated usage of SharePoint within the respective business processes were asked to rank their level of satisfaction. Amongst these users, very few “excellent” rankings were received. While the more popularly deployed employee Web sites received rankings weighted toward “very good,” satisfaction with SharePoint within most other processes is between “fair” and “good.” (See Figure 15.)

Figure 15. Rank Your Satisfaction with SharePoint Functionality in the Following Business Processes.

These findings further strengthen the case that SharePoint is widely deployed, but only as a component in ECM implementations and within particular business applications. Even in cases where it is used, its features will likely be augmented with complementary products, due to less than exemplary performance and functionality.

Also, SharePoint is most often used (81% of respondents) in conjunction with desktop documents. There is, of course, a natural affinity between SharePoint and desktop files as both are the domain of the same provider, Microsoft. Thus the level of integration and synergy between SharePoint functionality and desktop files, such as Word, Excel and PowerPoint documents is self-evident.

In fact, given this, it is somewhat surprising that only 81% indicated that desktop files were managed within SharePoint. (See Figure 16.)

Standard operating procedures and technical documentation are each managed within SharePoint by 77% of the surveyed organizations. Both of these file types are internally-focused, and it is likely that their relationship with SharePoint is connected to the fact that so many SharePoint deployments are done within employee-facing Web sites. (See Figure 12.)

This relationship is likely also behind the 51% of respondents who use SharePoint to manage financial and operational reports, and the 49% who use it to handle legal contracts and agreements. (See Figure 16.) Both content types tend to be positioned predominately for internal consumption. The lower uptake, however, may be due to the fact that financial statements and legal agreements are typically subjected to a higher degree of security and records management, which were not seen as a SharePoint strength.
Given that SharePoint is predominately positioned as a component in an overall business process and ECM strategy, it is fair to assume that current implementations involve some degree of customization and integration with other solutions, such as workflow, complex authoring and records management software, as well as various forms of content, such as multimedia, e-mail and technical drawings.

The survey looked specifically at the realities of SharePoint development and deployment, including respondents’ experiences with integration and customization. These findings are the focus of the next section of this white paper.

**User Expectations Realistic, but Customization Can Require Greater Effort and Budget**

As introduced in the preceding section, current SharePoint practices necessitate integration with various other functions and content types. Thus, integration likely becomes a major facet of many SharePoint implementations. When asked to focus on the development of custom solutions within SharePoint, 50% of survey respondents indicated that such efforts require more effort than expected (33% “somewhat more” and 17% “much more”). Only 26% felt their expectations for customization ended up being in line with the reality of the development process. (See Figure 17.)

**Figure 17. Do You or Are You Likely to Use SharePoint to Create, Manage and Store the Following Types of Business Content?**

![Bar chart showing the distribution of responses for various types of business content.](chart)

**Figure 17. Does the Development of SharePoint-based Custom Solutions Require More or Less Effort Than You Initially Expected?**

![Bar chart showing the distribution of responses for development effort.](chart)
Respondents pointed to developer training and toolset (44%), integration with existing applications (37%), integration with non-Microsoft repositories (34%) and integration with existing IT infrastructure (31%) as the four greatest challenges associated with SharePoint solution development. (See Figure 18.) Although not a single factor stands out as a trend, it is interesting to note that all revolve around integration. Thus, while the points of integration may be different among SharePoint users, the challenge of integration overall remains constant.

**Figure 18. What Were the Greatest Challenges in Developing Business Solutions on Top of SharePoint?**

Beyond the effort required for custom development, the gap between user expectations and reality is not as dramatic. Survey respondents were evenly split in their answers regarding the time it took to implement SharePoint and the effort required for maintenance and support.

Half felt that reality was aligned with their expectations, while the other half felt their SharePoint projects required more work than anticipated. However, the majority of the latter camp said it was only somewhat more. (See Figures 19 and 20.)

**Figure 19. How Would You Characterize Your Time to Implement and Deploy SharePoint?**

**Figure 20. How Would You Characterize Your Experience with Maintaining and Supporting Your SharePoint Deployment?**
SharePoint License Costs in Line with Expectations but Total Solution Costs May Exceed Expectations

User expectations concerning SharePoint’s cost are a bit more realistic, especially in the case of basic licenses. The great majority, 71%, felt that license costs were in line with what was anticipated, with another 7% feeling that license costs were less than anticipated. (See Figure 21.)

On the other hand, only 53% of survey respondents felt that overall implementation costs (e.g. services, integration, training and deployment), were in accord with (49%) or less than (4%) expectations. Almost half, 47%, felt that overall implementation ended up costing more than anticipated. (See Figure 22.)

The gap between the anticipated cost and the actual cost associated with overall implementation, versus the near-perfect alignment between expected and actual licensing costs, supports the finding that many SharePoint users underestimate the effort and time associated with integration and customization.

Figure 21. How Would You Characterize Your Experience With Overall SharePoint Associated License Costs?

<table>
<thead>
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</tr>
</thead>
<tbody>
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<td>7%</td>
</tr>
<tr>
<td>In line with what we anticipated</td>
<td>71%</td>
</tr>
<tr>
<td>Somewhat more than we anticipated</td>
<td>15%</td>
</tr>
<tr>
<td>Significantly more than we anticipated</td>
<td>8%</td>
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</tbody>
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Figure 22. How Would You Characterize Your Experience With SharePoint Overall Implementation Costs (e.g. Services, Integration, Training and Deployment)?

<table>
<thead>
<tr>
<th>Experience</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
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<tr>
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<td>49%</td>
</tr>
<tr>
<td>Somewhat more than we anticipated</td>
<td>35%</td>
</tr>
<tr>
<td>Significantly more than we anticipated</td>
<td>12%</td>
</tr>
</tbody>
</table>

Scalability—Too Soon to Tell

Despite the relatively high adoption rate of SharePoint across multiple departments and enterprises (See Figure 4), most survey respondents had not scaled their SharePoint implementations. Only 30% indicated experience with scaling SharePoint. Of those, 23% reported success. The other 7% ran into problems that caused them to stop their scaling efforts. (See Figure 23.)

Among those that did encounter problems with scalability, the most-often cited causes were support for more complex content and greater volumes of content (59%) administration (59%) performance (47%) and supporting more complex applications (42%). (See Figure 24.) It is interesting to note that two of these issues, supporting more complex content and supporting more complex applications, are associated with the obstacles and costs associated with customization and integration discussed above. (See Figures 19 and 22.)

There is an optimistic attitude among those that have not yet tried to scale their SharePoint implementations. Forty-seven percent of those surveyed said they did not anticipate having any problems regarding scalability. Conversely, 23% had concerns. (See Figure 23.)
Given that the majority, 70%, had not yet tried to scale SharePoint, and the gap between expectations and the actual costs and time associated with integration and customization, it may be prudent for SharePoint users to approach scaling cautiously.

**Figure 23. What is Your Opinion/Experience With SharePoint Scalability?**

- We have successfully scaled SharePoint: 23%
- We have not tried—but believe it will scale well: 47%
- We have not tried—but have concerns about scalability: 23%
- We tried to scale—but ran into problems that stopped us: 7%

**Figure 24. What Were/Are Your Scalability Problems Related to?**

- Supporting a greater quantity or more complex content: 59%
- Administration: 55%
- Performance: 47%
- Supporting more complex applications: 42%
- Security: 36%
- Supporting more users: 27%
- Training: 23%

**Conclusions and Observations**

According to the survey data, SharePoint has been deployed in many organizations, but while deployment is broad, it is being used in a limited capacity. Despite a litany of functionality, usage focuses on file sharing and portals, leveraged predominately in employee facing websites with knowledge management/collaboration close behind. User satisfaction levels with SharePoint mirror the current uptake in functionality. The popular file sharing and portal functionality gets a “very good” grade from users, but all other functionality, with the exception of portal platform, was ranked between was ranked between “fair” and “good”. It is likely that user dissatisfaction with the level of performance in these functional areas leads to little or no leveraging of SharePoint in compliance, e-discovery, external website, complex authoring, and archival/preservation applications. Indeed, a lack of adequate security and control functionality not only limits the applications that most organizations are deploying SharePoint within, but also has relegated SharePoint near exclusively to an inside the firewall platform. Beyond this, the need to and effort involved with integrating and customizing SharePoint applications is proving to be the most significant challenge to enterprise deployments.
Appendix

Methodology Used and Survey Demographics

The findings in this report are based on a survey conducted by Information Architected on behalf of AIIM during the last two weeks of November 2008. We received 616 responses in total. A series of winnowing techniques were used, however, ultimately yielding 353 valid responses that were the focus of the study as discussed in this white paper. (See below for details.)

A Focus on “Medium to Large” Organizations That Have Used SharePoint

By design, the survey excluded respondents that worked in organizations with fewer than 100 employees. Within the resulting mix of organizations, there was an almost even split between companies with 101 to 2,000 employees (34%) and large enterprises, defined as having more than 5,000 employees (30%). Another 19% of the respondents came from companies with 2,001 to 5,000 employees. (See Figure 25.) Together, this population was 511 individuals.

Figure 25. How Many Employees are in Your Organization?

As previously discussed in the first section of this white paper (See Figure 1), these 511 respondents were asked if their organization had used SharePoint in a production capacity. Thirty-one percent indicated they had not. These 158 individuals were also eliminated, rendering a total survey population of 353.

(Note: the 158 respondents who indicated they had never used SharePoint in production were asked one additional question, “Why Hasn’t Your Organization Used SharePoint?” See Figure 2 for detail on their response.)
A Balanced Perspective Between IT and Business Users

Among the 353 respondents that ultimately made up the survey population, there was nearly a perfect split between IT staff (53%) and business users (47%). (See Figure 26.)

This provided a balanced perspective. Interestingly enough, however, when we segregated responses based on users’ affiliation with business or IT, there were only insignificant changes to the overall survey findings. That is to say, that within each group, the percentage of mix on responses to questions was virtually the same as for the whole survey population.

Figure 26. Do You Consider Yourself Aligned More With the IT Operations or Business Operations of Your Organization?
About the Author
Carl Frappaolo is a co-founder and principal of Information Architected. He has more than 25 years of experience working with a broad array of business solutions, including knowledge and content management, portals, search engines, document management, workflow, business process management (BPM), records management, imaging, intranets, electronic document databases and sourcing strategy.

Mr. Frappaolo is well-versed in the practical business and technical aspects of implementing large-scale e-applications. Prior to forming Information Architected, Mr. Frappaolo was Vice President and founder of the Market Intelligence unit of AIIM International (2007–2008). He was also the founder of Delphi Group (1988-2004). Mr. Frappaolo has been recognized by AIIM as a Master of Information Technology and as an Information Systems Laureate, and in 2000, was bestowed the Distinguished Service Award by AIIM.

He is the author of four books. His professional blog can be found at www.TakingAIIM.com

About Information Architected
Information Architected is a consultancy focused on the intelligent use of content, knowledge and processes to drive innovation and thrive in a digital world. Our founders have over four decades of experience and industry recognition as experts and thought leaders in facilitating the successful creation and leveraging of ECM technologies to bring about positive business change.

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Oracle is the largest business software company in the world, with more than 320,000 customers—including 98 of the Fortune 100—and supports these customers in more than 145 countries. Oracle Fusion Middleware consolidates Oracle's leading, standards-based software to deliver "hot-pluggable" middleware with a comprehensive and seamlessly integrated service-oriented architecture software infrastructure. Oracle Fusion Middleware's Enterprise 2.0 capabilities can extend and complement the functions of other IT solutions including Microsoft SharePoint through standards-based and custom integrations. Oracle Fusion Middleware delivers Enterprise 2.0 capabilities through three product families—Oracle Content Management, Oracle WebCenter Suite and Oracle Beehive.

Oracle Content Management provides the industry's most usable, manageable and hot-pluggable Enterprise Content Management platform that delivers best-in-class enterprise document management, Web content management, digital asset management, records retention, archiving and information rights management functionality. Oracle Content Management can extend Microsoft SharePoint through its highly scalable and secure repository and enterprise class services that support complex data sets and business processes.

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