

ECM Industry Perspectives - 6 Years On

An interview with Dr. Ulrich Kampffmeyer

John Symon and Dr. Ulrich Kampffmeyer



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*Back in 2009 Document Boss caught up with three leading industry veterans **John Mancini**, (President of AIIIM), **Alan Pelz-Sharpe** (Research Director for Social Business at 451 Research) and **Ulrich Kampffmeyer (Kff)**, (CEO of Project Consult) to get their [perspectives](#) on the changing dynamics, consolidation and further evolution of the ECM sector. There was a general consensus then that this industry acronym, while useful for the vendor community, would morph into a broader Enterprise Information Management marketplace. Organizations increasingly needed to integrate their unstructured content with structured data and there was a growing convergence emerging with other areas such as CRM, ERP, SharePoint, PLM and other application software. Further, the disruption of Cloud, SaaS, Social and web 2.0 technologies was expected to have a major impact on this sector. Six years on **John Symon (JS)**, Document Boss' SVP, International Markets, re-connects with John, Alan & Ulrich to get an update on these perspectives, the further impact of technology disruption from both an end user and vendor perspective, and what further likely changes they see on the horizon over the next 2-3 years.*

<JS>: What do you see have been the major factors and changes that have influenced the way end users have acquired ECM/IM technologies, applications & services over the past six years?

<Kff>: We have seen many changes and transformations in the traditional ECM Enterprise Content Management market; the old ECM paradigm has drifted into the background. Whilst in 2009, trends such as Enterprise 2.0, OpenSource and Sharepoint were imminent, today's landscape is totally different. The SMAC-stack - Social, Mobile, Analytics and Cloud - has disrupted the habitual strategies of users, organizations and vendors alike. Other trends are now following on from the SMAC-stack, a new wave, including IoT, 3D, ubiquitous, intelligent robotics and virtual reality amongst a host of others.

Throughout these sweeping changes, vendors have had to adapt, with a considerable number being acquired by other software companies. We have witnessed big deals, such as Dell's recent acquisition of EMC, including Documentum, for \$67 billion, and smaller deals such as the acquisitions of KOFAX, SAPERION, CEYONIQ and many others.

As already defined in the early days, ECM - Enterprise Content Management - became a basic IT infrastructure. Obviously, these technologies are now mature and consequently, there is only limited innovation coming from the traditional ECM sector. Most new developments currently stem from outside the ECM arena, from innovative companies in the web, collaboration, communication and digital business environments, whilst cloud-based offerings also lead the way to new applications. The traditional perception of a digital document as one file, comparable to a paper document, is fading fast – brought about mainly by the increasing use of mobile technologies. Documents are virtualized and data is presented in layouts that simulate documents but which are easier to use on the Web and mobile devices: literally, information at your fingertips.



New challenges are posed by multimedia, video, natural language, digital models and mash-ups; a complete new world, which goes far beyond traditional document management and content management. With new technologies and user behavior changes, this might be the biggest challenge yet for ECM vendors - creating simple, easy to use applications like apps on a tablet, usable intuitively, without training, anywhere, at any time. ECM products have been enhanced to meet these new challenges, but striving to maintain the rapid pace of the development of information and communication technologies remains a challenge.

<JS>: How has this affected the traditional ECM vendor community and what do you consider they will need to do to survive and thrive in the next six years?

<Kff>: Other analysts will focus on the global market or on the US market - so I will focus on Europe. Naturally, European buyers will also scrutinize emerging international trends alongside cloud, mobile and other technologies which are now mainstream. However, most businesses still have legacy IT and software and there are many restrictions in regard to fully adopting new trends in digital business. A large proportion of company budgets will go into the modernization of existing systems and ECM still plays no major role here.

New opportunities are arising in Europe via regional and local, legal and compliance regulations such as the EU directive, eIDAS, which addresses the management and acceptance of electronic IDs and signatures, or the EU directive covering Electronic Invoices. The latter will lead to a boom in electronic invoicing projects but the traditional document or capture features will play only a minor role in this. In direct relation to these pan-European, legal directives, e-government is a major source of new projects throughout Europe. Automation to overcome manual and paper-based processes is another important, strategic goal for all businesses and organizations. Compatibility with mobile devices and operating systems is already a matter of course and therefore, no longer positioned as a trend. So, for ECM in Europe, my top 10 list for 2016 includes:

- Modernization and migration of existing solutions
- Automation, i.e. automated classification
- ECM, at least archiving, from the cloud as SaaS, PaaS
- More collaboration than pre-defined workflows
- Electronic folder management
- E-Invoicing and financial supply chain management
- Integration of analytics
- Integration of new media
- Compliance related solutions, i.e. records management (although in Germany this term still plays no role)
- A renaissance of knowledge management



<JS>: What further changes do you see impacting ECM/IM sector over the next six years and is this still a definable market?

<Kff>: Six years ago I wrote about EIM - Enterprise Information Management - as the new strategy. EIM incorporates ECM technologies as its core components. So, ECM is not dead, it has only become invisible. This also means that ECM as a separate industry segment is vanishing. A lot of vendors no longer want to be recognized as traditional EDM or ECM product providers. They go for applications which use ECM as a backbone. After more than 15 years, ECM still lacks visibility as an important technology and method to organize and tap into the growing wave of information. Yes, ECM is still important and a necessity, but no longer as part of the user experience. Users simply want to have their information and they don't want to expend effort storing and classifying it.

The fact that ECM functionality comes as a basic feature in a growing number of standard business applications such as ERP, CRM, PLM and so on, poses a major challenge for specialized ECM companies. ECM as a concept is not dead, but the conventional software companies now have to seek new shores. I believe that EIM - Enterprise Information Management - will not fill the gap ECM leaves, although EIM overcomes the old barrier between NCI & CI, curating all types of information. The future will be information management only, because enterprises have changed beyond recognition to embrace new models of working, including partnerships, employing freelancers and greater customer interactions - Totally changing the meaning of the word "enterprise". So we can therefore, omit the "enterprise" in the term "Enterprise Information Management". Let's simply talk about Information Management as the necessary, basic functionality to handle all information, wherever it exists.



Profile



Dr. Ulrich Kampffmeyer is founder and president of PROJECT CONSULT Unternehmensberatung Dr. Ulrich Kampffmeyer GmbH, one of the leading independent management consultancies for EIM Enterprise Information Management, ECM Enterprise Content Management, BPM Business Process Management, KM Knowledge Management, CM Change Management and other information technologies. He was co-founder and member of the board of directors of the DLM-Network EEIG, Worcester.

As a principal consultant he has supported a large number of vendors, distributors, and users of well-known companies of all industries in Europe in strategy, compliance, planning, organization, implementation and migration of such systems. German industry magazines elected him as one of the 25 most important people of the EIM industry - the only consultant within this group - , and as one of 100 of the most important IT managers in Germany.

Dr. Kampffmeyer is an internationally well-known keynote speaker, presenter, and panelist on the subject of EIM, ECM, archiving, records management, document management, workflow, groupware, content management, code of practices, knowledge management, project management, business reengineering, and organizational change management.

Within the Association of Information and Image Management (AIIM), the most important association for the global community of information professionals, Dr. Kampffmeyer was one of the directors and member of the executive committee of AIIM International in Europe and Vice-Chair of the board of directors of AIIM International (1999 – 2003). For the major part he has played in the introduction of information technologies and their applications in Germany, he has received the "Award of Excellence" in 1992, the "Fellow of IMC" in 1994, the Award „Fellow of Merit“ in 1997, the Award „Fellow of AIIM“ 1999, and in 2000 the award „Master of Information Technology“.

As Chairman of the Board of the VOI "Verband Optische Informationssysteme e. V." (trade association of German EDM manufacturers, distributors, and integrators) from 1991 to 1998, Dr. Kampffmeyer gained detailed market knowledge in the segments of document management, workflow, groupware, electronic archiving, and digital optical storage media. He is regarded as mentor of the EIM field in Germany.

He is publisher of several DLM/AIIM Industry White Papers for electronic document, records management, and content management for the Public Sector in Europe. Leading industry magazines regularly publish his articles and opinions in several languages.

He is author of the book „Document Management – Principles and Future“ as well as the German Codes of Practice „Fundamental Principles of Electronic Archiving“, and „Principles of the documentation of audit-proof records management“. He is also co-author of other European Codes of Best Practice.

Dr. Kampffmeyer takes part in standardizing groups such as the AIIM Association for Information and Image Management, and several ISO/DIN groups. He was a member of the DLM Monitoring Committee of the European Commission, was Head of the DLM Scientific Committee of the DLM Forum Conference 2002 in Barcelona, and worked in the Steering Committee of the DLM Network of Excellence.

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