Addressing the Document Disconnect

Hidden Opportunity, Big Payoff

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Executive Summary

In November 2014, IDC undertook a global study of more than 1,500 line-of-business leaders, IT leaders, and information workers in the United States, the United Kingdom, France, Germany, Australia, and Japan to assess the effectiveness of their organization's document-based business processes. The goal of our survey was to better understand the implications of inefficiencies in these processes.

Our study shows that organizations of all sizes in all industries around the world are suffering from what we call the "document disconnect." Broadly, the "document disconnect" results in significant delays and errors across critical business functions such as sales contracting and quoting, procurement, talent acquisition, and onboarding. It is a serious impediment to business that — according to our respondents — negatively affects revenue, compliance, cost, productivity, and customer experience.

This is a pervasive problem that affects all functional areas of the organization. Disconnected document processes can be found in every department, and they have a very significant negative impact on the organization. They:

- **Adversely impact revenue and revenue recognition and create audit issues.** 76% of line-of-business leaders say document process issues impact revenue recognition and/or create auditor issues.

- **Reduce business agility.** 46% of business leaders say disconnected document processes impair their ability to plan, forecast, and budget because of lack of visibility.

- **Reduce employee productivity and increase operating costs.** Business leaders say their staff spends more than one-third (36%) of their time on administrative tasks — and less than two-thirds (64%) on their core job function.

- **Create business and/or compliance risk.** More than a third of business leaders say they have problems with agreements that are missing signatures, initials, or dates — or that have been signed by the wrong person; nearly half (46%) aren't sure they have copies of all signed agreements. Just over half (51%) say they have problems with documents that are misfiled or lost.

- **Adversely impact customer experience.** 77% of line-of-business leaders say the gaps in automation in their existing systems — and the lack of integration between them — adversely impact the quality of the customer experience they can provide. 63% say document process issues negatively impact customer satisfaction.

Certainly, the negative impact on customer experience is costing organizations dearly in terms of bottom-line revenue.

Addressing the document disconnect can provide exceptional benefits in terms of reduced cost and risk. Line-of-business leaders we surveyed estimate that fully addressing the gaps in their departmental document processes could yield a:

- **36% increase in revenue**

- **30% reduction in cost**

- **23% reduction in business/compliance risk**

IDC believes that organizations that address their "document disconnect" in the near term will enjoy clear advantages over competitors that ignore it. Despite the outsized impact that the "disconnect" has on the organization and its customers, ROI can often be realized without disruption of existing systems or great expense. Organizations can "start small" and work incrementally. The maximum benefit, however, will accrue for organizations that seek to address the document disconnect enterprisewide. IDC believes this is a golden opportunity for IT to take a leadership role.

This white paper reports the key findings from our global study on document processes and provides recommendations for addressing the document disconnect.

Meeting Expectations in a Mobile, Connected World: The Document Disconnect

Organizations must support a mobile, connected customer base and workforce or risk being left behind. Mobility and connectivity have profoundly changed the way we live and work. The vast majority (83%) of people in developed economies use the Internet today (by 2018, this will grow to 86%). A preponderance (81%) of them access the Internet using a mobile device (by 2018, 92% will access the Internet using a mobile device).[1]

However, despite a heavy investment in mobility, connectivity, and specialized line-of-business applications such as enterprise resource planning (ERP), customer relationship management (CRM), human capital management (HCM), supply chain management (SCM), and contract management, the "last mile" of many enterprise business processes remains a disconnected, discontinuous experience.

That "last mile" often requires exchanging information in document form to complete a "transaction"; obtain approvals, sign-offs, or acknowledgements; or enlist others for review and collaboration — including both internal and external stakeholders. After all, documents are how people communicate ideas, share information, and record their understandings.

Alas, the information needed for these documents is often contained in multiple systems — essentially, "digital silos." 81% of the line-of-business leaders we surveyed point to problems that arise because they have different internal systems/applications that don't "talk" to each other or because people outside their organization with whom they need to exchange documents use a different system/application. Because the systems aren't connected, information workers must undertake a series of separate, manual activities. As a result, these high-value, business-critical document-based processes are fragile, error prone, and fraught with risk.

The "document disconnect" undermines the quality of the end-to-end business processes those document processes support, whether quote to cash, procure to pay, hire to retire, and so forth. IDC believes the document disconnect is a primary impediment to the effectiveness of — and visibility into — mission-critical enterprise business processes.

Hidden Risks

Because of the gaps in automation in "last mile" document processes, mistakes quickly crop up. All too often, they are discovered late in the overall business process, which creates significant business and compliance risk. 36% of line-of-business leaders cite agreements that are missing signatures, initials, or dates — or that have been signed by the wrong person. 51% say documents are often misfiled or lost; and 46% say they aren't sure they have copies of all signed agreements.

Disconnected document processes negatively impact revenue accounting. Three-quarters (76%) of business leaders say document process issues impact revenue recognition and/or create auditor issues.

The document disconnect results in business processes that lack visibility and traceability. 55% of business leaders say they can't tell whether documents have been viewed, reviewed, or signed by the appropriate people and find it difficult to get up-to-date status information. 38% of business leaders say it's difficult to relate documents or versions of documents to important context.

Finally, the document disconnect negatively impacts business agility. 46% of business leaders say the lack of visibility due to ineffective document processes impairs their ability to plan, forecast, and budget.

Hidden Costs

Information workers feel the impact of the document disconnect on a daily basis. Although three-quarters of the information workers we surveyed use one or more enterprise applications, when it comes to that "last mile" of document-based interaction, they are left to improvise using a hodgepodge of general-purpose productivity and collaboration tools, stringing together a series of manual tasks. Over half (53%) of information workers say either their business applications don't automate their document-based processes or they have different systems/applications that don't talk to each other — or the people with whom they need to exchange documents use a different system/application.

The resulting manual effort costs information workers significant time and effort and reduces their productivity — driving up the organization's staffing costs. Often, information workers must manually create documents — spending valuable time copying and pasting information and dealing with a variety of formatting (and sometimes branding) issues as they compile content from multiple sources into a single document. 43% of information workers say they need to use several disconnected systems or applications and often have to copy and paste or rekey information.

How Gaps Impact User Productivity

Because of the document disconnect, documents often make one or more transitions into and out of paper. For example, salespeople and customers may need to print out contracts to sign them and then scan them into PDFs and email them back to execute agreements. 56% of information workers say they often have to print out a document and then scan it to create a PDF.

Gaps in automation increase the organization's dependence on paper documents. In fact, information workers are spending just as much time today dealing with paper documents as they did two years ago. On average, one-fifth of their document processes are entirely paper based, one-fifth are entirely digital, and 60% are a mix of paper and digital. (In other words, 80% of document-based processes are at least partly dependent on paper.) Of the time they spend working with documents, information workers spend about a quarter of it dealing with paper.

Gaps in automation also increase the likelihood of problems arising when exchanging documents. 40% of information workers say the documents they send to other people don't always display or print correctly, and 38% say others sometimes can't even open them.

Information workers and the people with whom they exchange documents are forced to communicate by email or phone, meaning important context about the document is lost. This also increases the difficulty of collaboration. 41% of information workers find it difficult to collaborate across time zones, where they are much more dependent on email for context.

Because of the automation gaps, information workers must manually route documents and then follow up and keep track of their status using spreadsheets or calendar reminders. 53% of information workers say following up with people to get documents reviewed, approved, or signed is time consuming.

> Gaps in automation increase the organization's dependence on paper documents.

In addition, document processes are often multiparty exchanges that traverse functional (departmental) and organizational boundaries. On average, three to five people — often as many as seven — need to review, approve, sign, or take action on a particular document. This makes following up and keeping track of status even more challenging.

Finally, the document disconnect makes it much more difficult for information workers to get their work done using their mobile devices. Nearly half (46%) of information workers say they often have to wait until they are back at their computer to complete document-based tasks. Three out of five information workers are unable to view, retrieve, edit, comment on, send (for review or signature), track (documents they've sent for review or signature), or sign documents using their mobile devices.

All of this adds up to a significant drain on staff productivity because such a large percentage of information workers' time is spent working with documents (80%). Information workers report that they devote 72% of their time at work performing their core job function: 28% of their time is eaten up by administrative tasks. Information workers estimate that having an automated system that generates and routes documents for approvals or signing, tracks status, and files signed/approved documents would free 30% of their time for higher-value activities.

Negative Impact on Customer Experience

Organizations are investing significantly in modernizing their customer-facing business processes. Ineffective document-based processes, however, undermine these efforts. 77% of business leaders say the gaps in automation in their existing systems — and the lack of integration between them — adversely impact the quality of the customer experience they can provide.

63% of business leaders say ineffective document processes negatively impact customer satisfaction. 72% of business leaders agree that improving their document processes would increase customer satisfaction and/or increase brand value. 82% of business leaders agree that taking the friction out of back-office and front-office business processes is essential for improving the customer experience.

Business Benefits of Addressing the Document Disconnect

We asked line-of-business leaders to estimate the potential impact of fully addressing the gaps in their departmental document processes on revenue, cost, and risk. Overall, they see a huge potential payoff in all three areas:

- **36% increase in revenue.** 47% of line-of-business leaders say addressing the document disconnect would speed time to revenue, 46% say it would reduce cycle time and offer quicker time to results, and 41% say it would help them get new products and services to market more quickly.

- **30% reduction in cost.** 45% of line-of-business leaders and information workers say addressing the document disconnect would reduce cost, 48% of information workers say it would reduce errors and rework, 45% of business leaders say it would improve departmental productivity, and 41% say it would enable employees to focus on more important, valuable activities.

- **23% reduction in business/compliance risk.** The document disconnect exposes organizations to revenue recognition and contract compliance risks — not to mention risks related to information security and accidental exposure of confidential or sensitive information. Over half (55%) of IT leaders say their organization has suffered an information leak in the past 12 months.

Few IT investments afford such a compelling ROI. IDC believes most organizations can justify the investment based on hard-dollar cost savings alone.

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The Document Disconnect: Departmental Illustrations

Our study examined the impact of the document disconnect on individual departmental business processes in detail. As noted previously, this is a pervasive problem that affects *all* functional areas in the organization including sales, marketing, human resources (HR), finance, procurement, compliance, legal, operations, engineering/research and development, and manufacturing. Survey respondents told us that addressing the gaps in document processes would free up valuable time and empower them to:

- Improve branding and advertising

- Make customer communications more personalized

- Create new product and service offerings, improve product quality, and improve customer service

- Improve billing/collections and capture early payment discounts to improve cash flow

- Optimize inventory management

- Spend more time on forward-looking analysis and planning

The following sections take a closer look at the impact of — and the benefits of addressing — the document disconnect at the departmental level.

Addressing the Document Disconnect in Sales

> Sales teams estimate that addressing the document disconnect could free up 33% of their time. This would be tantamount to hiring one-third more salespeople.

Sales teams estimate that addressing the document disconnect could free up 33% of their time. This would be tantamount to hiring one-third more salespeople. Clearly, this could have a tremendous impact on the organization's ability to generate increased revenue. In addition:

- Closing deals faster eliminates risk and can mean the difference between a good quarter and failure to meet revenue goals.

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- Addressing the document disconnect helps eliminate revenue recognition and/or auditor issues, reducing business and compliance risk.

- Sales management gains visibility into and more control over the deal pipeline and forecasting.

Finally, addressing the document disconnect empowers salespeople to make a difference. Asked how they could put time saved to better use, they told us:

- "I could spend more time prospecting, negotiating, and selling — and following up with existing customers for additional orders/referrals."

- "I could spend more time coaching sales team members to make them more effective."

- "I could spend more time analyzing sales results and on strategic planning."

- "I could improve our competitive intelligence. That would help the whole team."

Figure 1 shows the types of documents that take up sales staff time.

19% of the documents that sales staff deal with are paper based; 56.7% are a mix of paper and digital. Only 22.2% are fully digital.

FIGURE 1

Document Types That Take Up Sales Staff Time

Q. How many of these documents do you work with per month? Is the workflow predominantly paper based/manual, digital/automated, or a mix of paper and digital?

Number of Sales Documents per Month
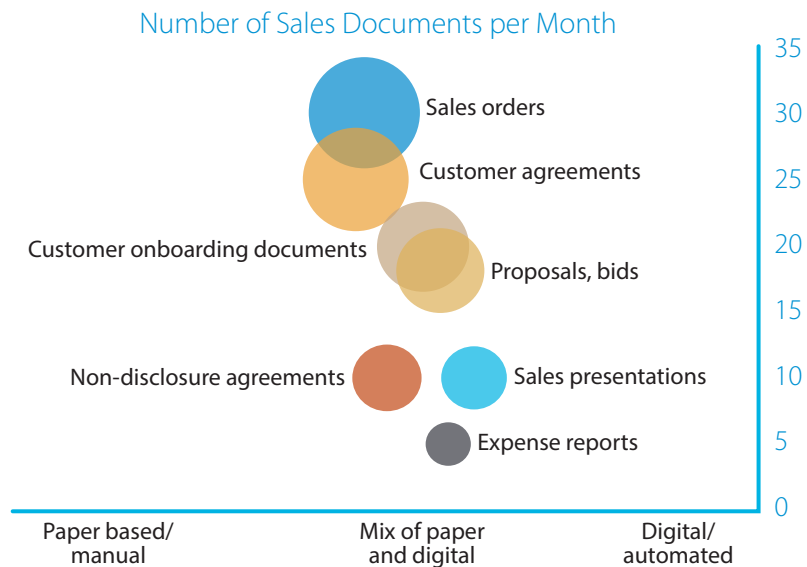
n = 154 information workers who work in sales; median number of documents per month

Source: IDC's Global Document Processes Survey, November 2014

HR teams estimate that 31% of their time could be freed up by addressing the document disconnect.

Addressing the Document Disconnect in HR

HR teams estimate that 31% of their time could be freed up by addressing the document disconnect. This is equivalent to hiring nearly a third more people in HR. The benefits to the organization of addressing the document disconnect in HR include:

- More time spent on programs for employee training and development — more skilled workers

- Quicker time to hire; improved recruitment/ability to compete for talent

- Improved employee satisfaction/retention/work-life balance (less work taken home; reduced overtime)

Here again, employees felt they could be empowered to make more of a difference. Asked what they could accomplish using the time freed up, they told us:

- "I could spend more time on strategic recruitment and interviewing and improve our hiring decisions."

- "I could revamp our new hire orientation programs to accelerate onboarding and work on innovative workforce programs to improve our culture and employee engagement."

- "I could evaluate and recommend improvements to our benefits programs."

Figure 2 shows the types of documents that take up HR staff time. 36% of the documents that HR staff deal with are paper based; 54% are a mix of paper and digital. Only 9% are fully digital.

FIGURE 2

Document Types That Take Up HR Staff Time

Q. How many of these documents do you work with per month? Is the workflow predominantly paper based/manual, digital/automated, or a mix of paper and digital?

Number of HR Documents per Month
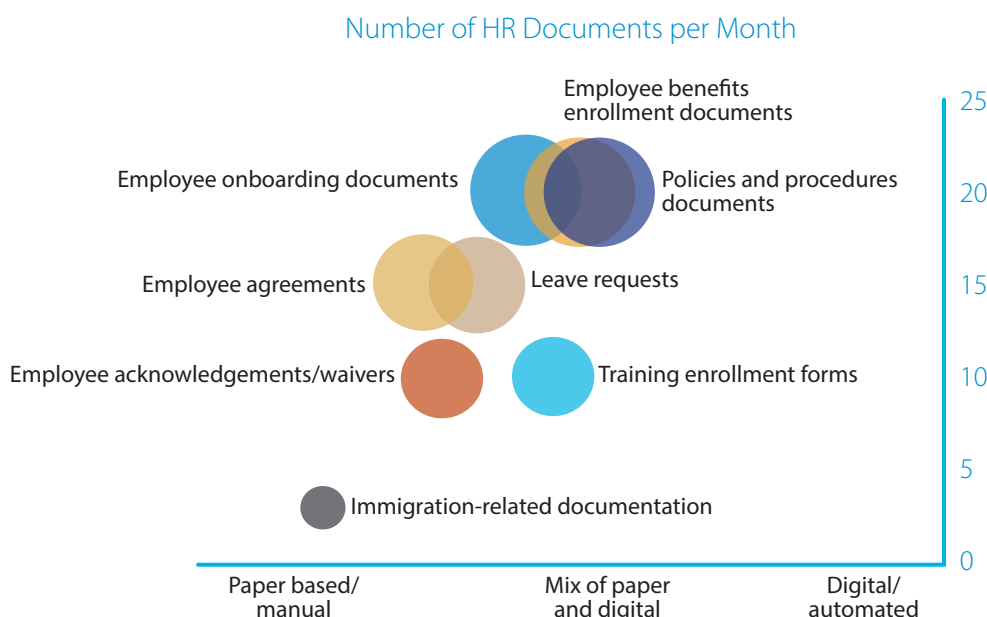
n = 155 information workers who work in HR; median number of documents per month
Source: IDC's Global Document Processes Survey, November 2014

Addressing the Document Disconnect in Procurement

Procurement teams believe 33% of their time could be freed up by addressing the document disconnect — the equivalent of hiring a third more staff. Benefits to the organization include:

- More time spent optimizing procurement strategy for direct and indirect goods

- Potentially, better pricing and reduced supply chain risk

- Improved control over contracting process and better management of supplier and vendor agreements

Here again, staff members were quick to volunteer ideas about how they could use time freed up for higher-value activities:

- "I could be more strategic in my approach to RFPs and RFQs and spend more time on negotiations."

- "I could identify new vendors and obtain better prices."

- "I could better manage our inventories and work with our board on strategic sourcing."

Figure 3 shows the types of documents that take up procurement staff time. 17.4% of the documents that procurement deals with are paper based; 65.2% are a mix of paper and digital. Only 17.4% are fully digital.

FIGURE 3

Document Types That Take Up Procurement Staff Time

Q. How many of these documents do you work with per month? Is the workflow predominantly paper based/manual, digital/automated, or a mix of paper and digital?

Number of Procurement Documents per Month
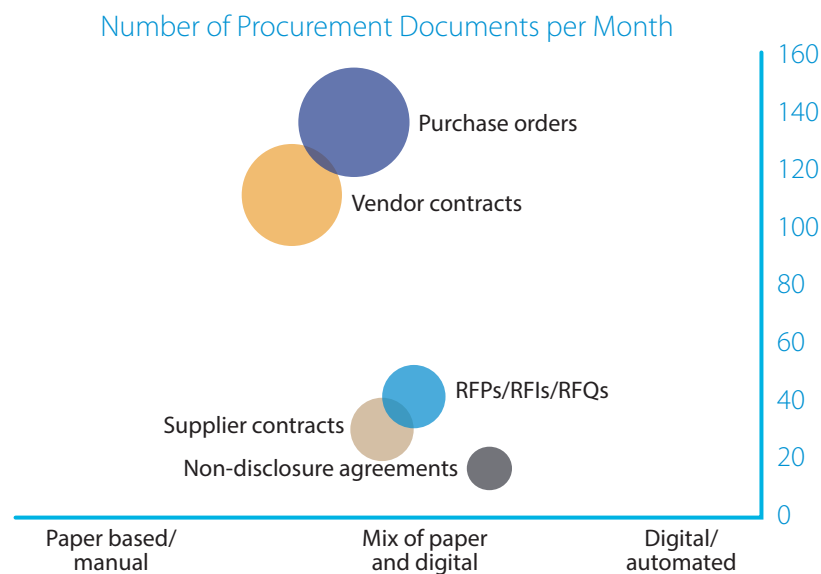
n = 133 information workers who work in procurement; median number of documents per month

Source: IDC's Global Document Processes Survey, November 2014

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Addressing the Document Disconnect in Legal

Legal teams say 28% of their time could be freed up by addressing the gaps in their document-based business processes.

Legal teams say 28% of their time could be freed up by addressing the gaps in their document-based business processes. This is tantamount to increasing the head count in the legal department by one additional FTE for every three-and-a-half people.

The benefits of improving legal document-based processes include:

- A dramatic reduction in the time that legal needs to spend reviewing and signing off on customer, supplier, vendor, partner, and employee agreements

- Improved compliance with company policies around agreements

- Assurance that the legal department always has correct, complete copies of all signed agreements — including NDAs, which crop up in half-a-dozen different departments

In addition, addressing the document disconnect empowers the legal staff to make a bigger difference in terms of business results. Asked what they could do with the time saved, they told us:

- "I could spend more time on strategic planning."

- "I could stay more up to date on changes to laws to ensure my company is minimizing risk and maximizing opportunities."

- "I could spend more time on things that would help us better attract, retain, and motivate staff."

Figure 4 shows the types of documents that take up legal staff time. 26.1% of the documents that legal staff deal with are paper based; 58.3% are a mix of paper and digital. Only 15.6% are fully digital.

FIGURE 4

Document Types That Take Up Legal Staff Time

Q. How many of these documents do you work with per month? Is the workflow predominantly paper based/manual, digital/automated, or a mix of paper and digital?

Number of Legal Documents per Month
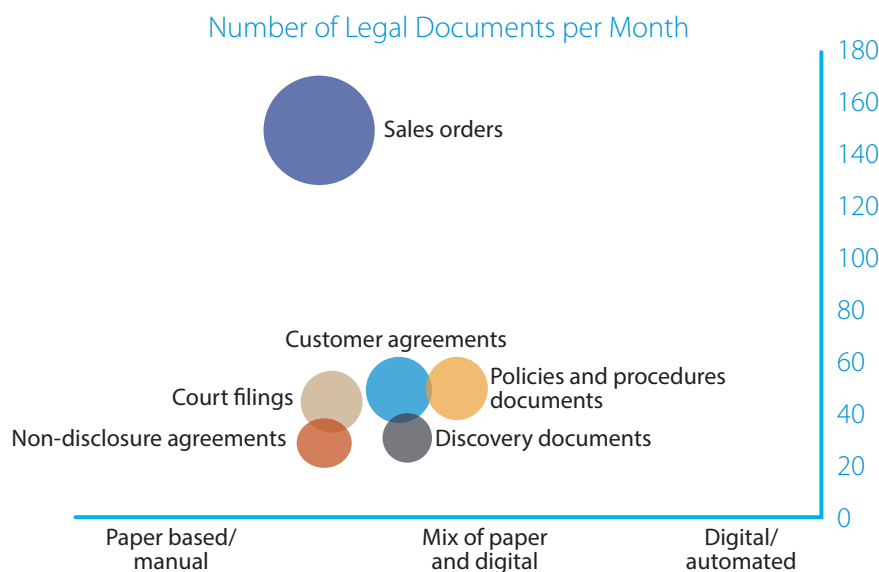
n = 114 information workers who work in legal; median number of documents per month

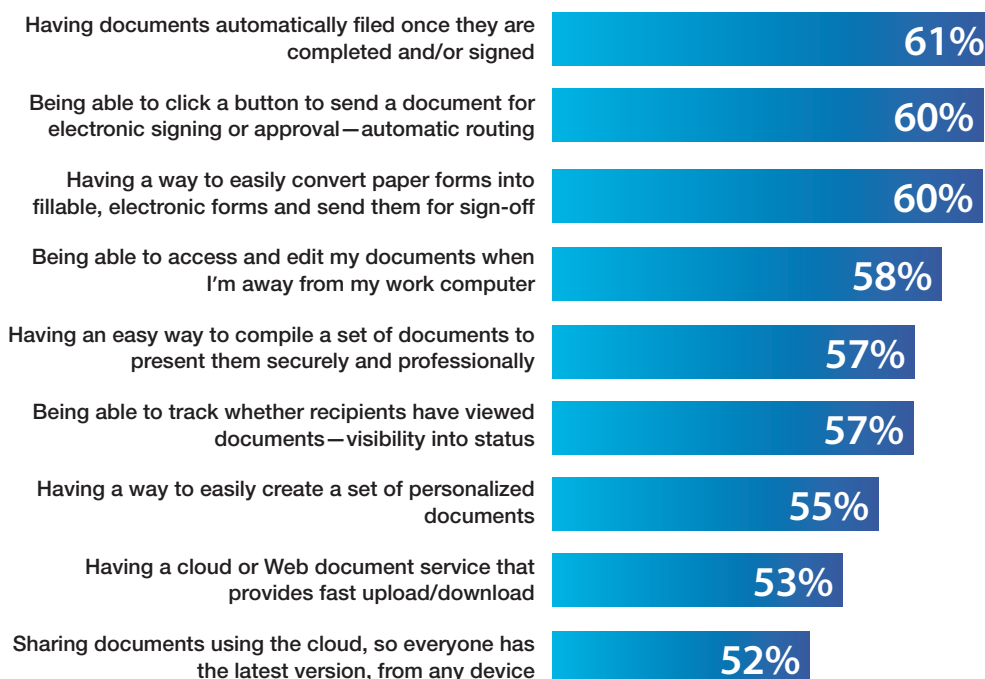*Source: IDC's Global Document Processes Survey, November 2014*

Remedy: What Business Users Need

Information workers acutely feel the need for a solution that bridges the gaps in their document-based business processes and that helps them work across digital silos using their mobile devices. Such a solution must address the pain points shown in Figure 5.

FIGURE 5

Things That Would Save Information Workers Time

Q. Thinking about things that could save you time, please rate the following on a scale from 1 to 5…

Item	Percentage
Having documents automatically filed once they are completed and/or signed	61%
Being able to click a button to send a document for electronic signing or approval—automatic routing	60%
Having a way to easily convert paper forms into fillable, electronic forms and send them for sign-off	60%
Being able to access and edit my documents when I'm away from my work computer	58%
Having an easy way to compile a set of documents to present them securely and professionally	57%
Being able to track whether recipients have viewed documents—visibility into status	57%
Having a way to easily create a set of personalized documents	55%
Having a cloud or Web document service that provides fast upload/download	53%
Sharing documents using the cloud, so everyone has the latest version, from any device	52%

n = 769
Note: Data represents the percentage of respondents who rated item a 4 or 5 on a scale from 1 to 5,
where 1 means it probably wouldn't help and 5 means it would help a great deal.
Source: IDC's Global Document Processes Survey, November 2014

Modern solutions that enable a connected, mobile style of work are a key ingredient of the remedy: 82% of line-of-business leaders say their teams would be much more productive if the applications they need to use every day all ran well on their mobile devices. And 74% of IT leaders say enabling easier and better collaboration and sharing with people both inside and outside the organization is important to users.

Opportunity for IT Leadership

Although departmental line-of-business leaders and information workers appear to be well acquainted with the adverse impacts of the document disconnect — and departmental business leaders are convinced of the benefits of addressing the gaps in their departmental document processes — this issue has, so far, remained under the radar in most organizations. Why has such an exceptional opportunity for ROI gone unaddressed?

Half-a-dozen different people may need to "touch" a document to bring it to completion.

We believe the main reason is that there often is no natural champion on the business side to advocate for change. As our study found, half-a-dozen different people may need to "touch" a document to bring it to completion, and typically these people come from different departments. Consequently, a particular workflow may not be "owned" by any given department. Indeed, we asked departmental information workers whether they were owners or reviewers of a given document type, and, on average, half described themselves as owners and half as reviewers.

Secondarily, as attractive as the potential ROI is at the departmental level, the strategic opportunity lies in addressing the document disconnect enterprisewide. This requires a broader view of enterprise business processes. Departmental business leaders may not appreciate the broader impact that disconnected document processes have on the organization as a whole.

IDC believes this is a golden opportunity for IT. IT can be a hero here if it assumes a leadership role. Addressing the document disconnect is very relevant to IT's charter as a strategic partner to the business, and this is a good time for IT and the business to engage. Our study shows good alignment between the business and IT with regard to the importance of delivering a good customer experience. Both sides are cognizant of the increasing control/influence that the business wields over the technology budget. At the same time, IT feels empowered to make an important difference to the business: 60% of IT leaders say IT's role is more strategic today than it was two years ago, and the overwhelming majority of IT leaders (94%) say IT is adequately/amply funded.

There is one perception gap between the business and IT that IT should seek to remedy in the context of improving the organization's document processes: IT underestimates the barriers to mobile information work. There is a significant disconnect between what information workers are able to do when it comes to working with documents on their mobile devices and what IT believes is already enabled.

Best Practices: Step 1, Assess

Organizations should begin by assessing both front-office (customer-facing) and back-office (supporting) document processes. Different processes will map to different maturity levels (see Table 1). Interviews with departmental business leaders and their teams will readily identify the gaps.

TABLE 1

Document Process Maturity Levels

Maturity Level	Business Value	Scope of Implementation	User Experience and Process Characteristics	Technology
Optimized (5)	End-to-end visibility and control over all document-based business processes; continuous insight and process improvement; significant business value realized	Multi-enterprise	Frictionless digital transactions, both externally and internally facing; processes are reengineered and optimized	Center of excellence or shared services support; organized sharing of best practices; users empowered to implement their own processes
Managed (4)	Multiple departments and/or cross-functional business processes optimized; demonstrated ROI at enterprise level	Enterprisewide	Reliable, consistent, and user-friendly experience across most types of digital transactions; processes are automated and self-documenting	Standardized, supported solution stack with rapid deployment methodology that enables users to deploy in some cases
Repeatable (3)	Quantifiable ROI at departmental level and/or for key cross-functional/organizational workflows	Multiple departments and/or cross-functional/organizational workflows	Consistent user experience for targeted cross-functional or departmental workflows; documents are fully digital but automation gaps persist; processes are incompletely documented	Common patterns and key components of solution stack identified across one or more departments or functional areas; implementation competency established around fixed scope and cost
Opportunistic (2)	Demonstrated productivity improvements and cost savings for targeted workflows or departments	One or more departments and/or cross-functional/organizational workflows	Inconsistent user experience across workflows and/or departments; mix of paper and digital but still unautomated and undocumented	Multiple projects identified; some components of a standardized solution identified
Ad Hoc (1)	Anecdotal ROI from isolated efforts	Individual departments, workflows	Poor user experience due to manual effort; largely paper based and unautomated; undocumented	Individual projects identified on break/fix basis; tactical purchase of point solutions; siloed approach affords little leverage with vendors or sharing of expertise

Source: IDC, 2015

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As a benchmark based on reliance on paper documents, we estimate that about a quarter of the organizations we surveyed are at the Ad Hoc level, 60% are at the Opportunistic level, and about one in six is at the Repeatable level.

Next, organizations should create a ranked list of candidate projects by ROI and stakeholder preparedness. Good initial candidates include:

- Revenue-generating and other customer-facing business processes in sales

- Strategic HR processes such as recruitment and onboarding

- Direct and indirect sourcing in procurement

- Contract management in legal

Best Practices: Step 2, Standardize

Organizations should seek to standardize on a common technology approach. There is a long list of document-based processes, and they have similar challenges and requirements. A good solution will:

- Integrate with existing processes and systems

- Be intuitive and easy for customers and employees to use

- Be simple to manage and quick to deploy

- Adhere to industry-standard security

- Come from an experienced, trusted provider

Organizations we surveyed are investing in electronic signature solutions (25%) and electronic forms solutions (32%) to address many of their document process challenges.

Key criteria for those in IT who are responsible for selecting solutions are shown in Figure 6.

Best Practices: Step 3, Replicate

Organizations should prioritize projects that offer a quick, demonstrable ROI. They should leverage skills and lessons learned from initial project(s) to establish a center of excellence or community of practice and share best practices. In addition, organizations should promote project successes and cultivate departmental "power users" to:
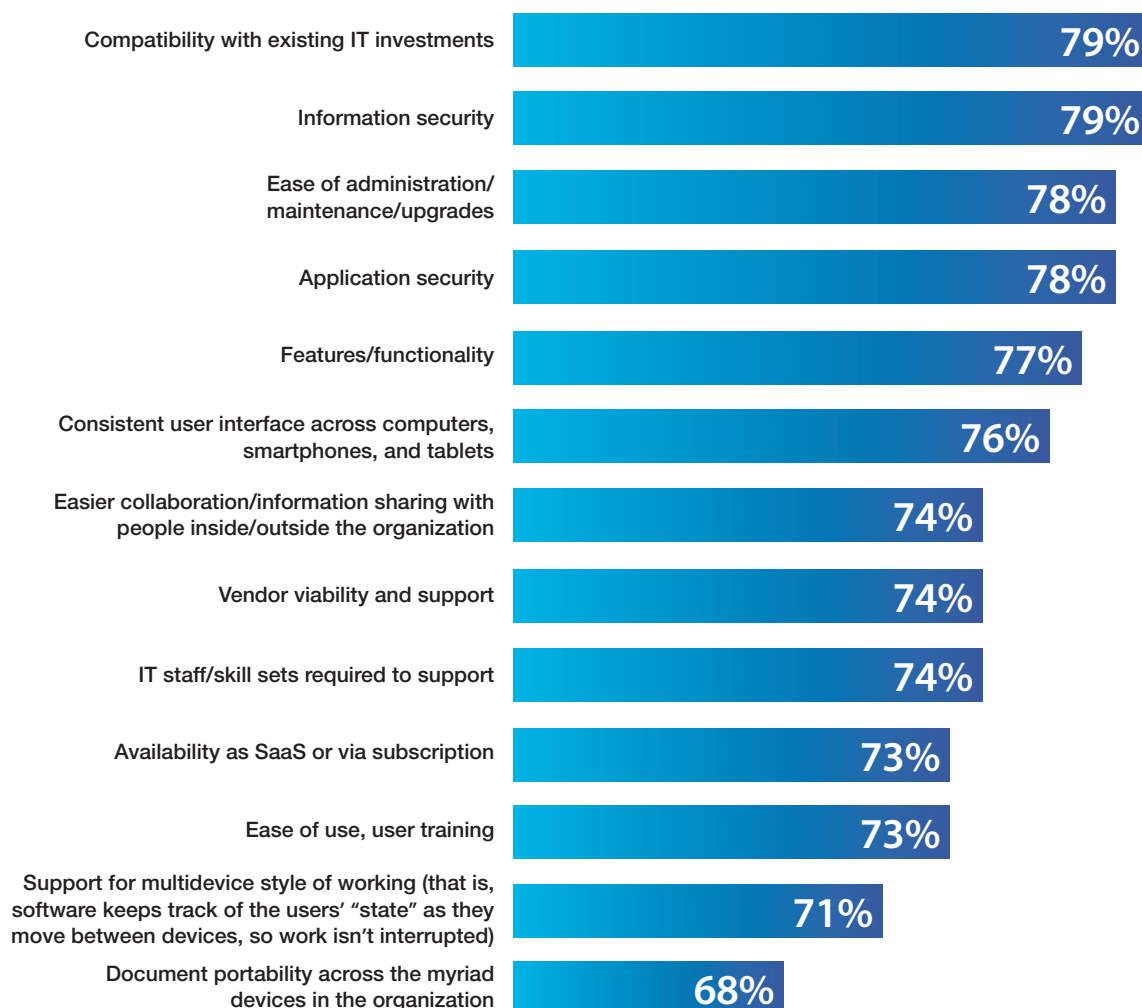
- Drive process improvement efforts in additional departmental workflows

- Extend benefits to new departments, leveraging shared workflows

- Build a broader awareness of the value of addressing the document disconnect

FIGURE 6

Key Selection Criteria for New Software Solutions

Q. How important are the following factors when evaluating new software?

Criteria	Percentage
Compatibility with existing IT investments	79%
Information security	79%
Ease of administration/maintenance/upgrades	78%
Application security	78%
Features/functionality	77%
Consistent user interface across computers, smartphones, and tablets	76%
Easier collaboration/information sharing with people inside/outside the organization	74%
Vendor viability and support	74%
IT staff/skill sets required to support	74%
Availability as SaaS or via subscription	73%
Ease of use, user training	73%
Support for multidevice style of working (that is, software keeps track of the users' "state" as they move between devices, so work isn't interrupted)	71%
Document portability across the myriad devices in the organization	68%

n = 413 IT leaders

Note: Data represents the percentage of respondents who rated each item as a 4 or 5 on a scale from 1 to 5, where 1 means not at all important and 5 means very important.

Source: IDC's Global Document Processes Survey, November 2014

Rewards of Taking Action

Disconnected document processes undermine the organization's investments in customer experience, leaving the organization at a competitive disadvantage when it comes to acquiring and retaining customers.

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Organizations must address the gaps in their front-office and back-office business processes or risk falling behind.

The good news is that the potential rewards of addressing the document disconnect are very compelling. As noted previously, business leaders estimate that closing the gaps in document processes could yield a:

- 36% increase in revenue

- 30% reduction in cost

- 23% reduction in business/compliance risk

For all of these reasons, bridging the document disconnect is a business imperative. Departmental business leaders and their teams are aware of the many disadvantages of their disconnected document processes and see the benefits of remediating them. Most organizations, however, fail to grasp the magnitude of the problem — and the potential payoff of addressing it — enterprisewide. Organizations need to make this a top priority.

Addressing the document disconnect requires leadership. IDC believes that IT is ideally positioned to provide that leadership in partnership with the business. Many of the gaps in document processes can be addressed economically without disruption of existing systems and applications and with quickly realized ROI. This offers IT an easy win, one that should help reinforce its strategic value to the business.

Organizations can begin with tactical projects and take an iterative, incremental approach for incremental ROI. The full benefits, however, will be realized by organizations that take a standardized approach enterprisewide.

The document disconnect will only become more apparent as business continues to go digital. Addressing it is an opportunity that savvy competitors are sure to exploit. The time is now.

Appendix: Methodology

The data presented in this white paper comes from a global, Web-based survey conducted in November 2014 of 1,518 line-of-business leaders, IT leaders, and information workers in the United States, the United Kingdom, France, Germany, Australia, and Japan. The sample was evenly split by country and represented a broad range of industries and company sizes (60% of respondents came from companies with 1,000 or more employees).

By title, 40% of respondents came from senior/executive management (CXOs, managing directors, EVPs, SVPs, VPs), 33% came from middle management (directors, managers), and 27% were non-managerial staff (including supervisors).

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