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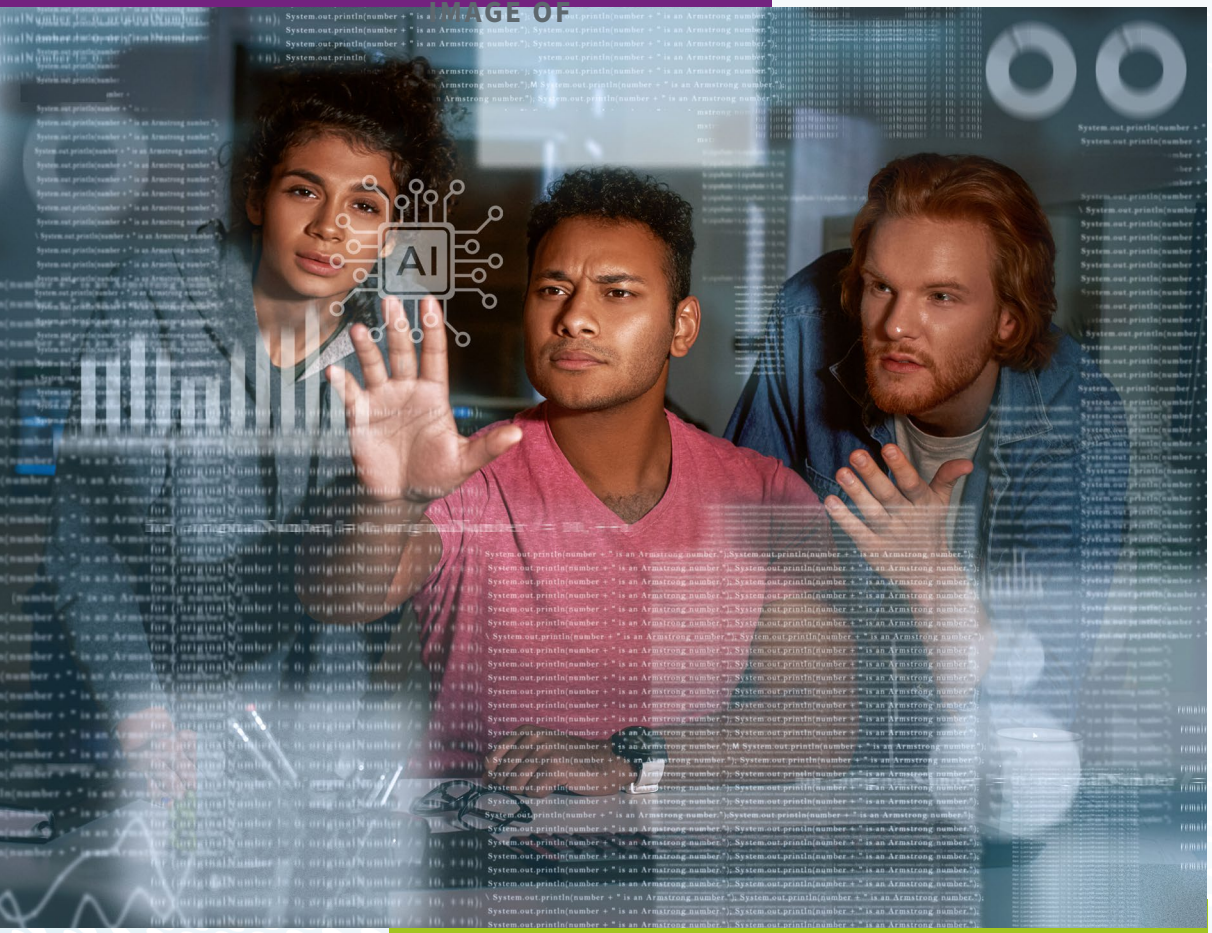
Association for Intelligent Information Management

AIIM 2024 INDUSTRY WATCH



STATE OF THE INTELLIGENT INFORMATION MANAGEMENT PRACTICE

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Executive Summary

1. Executive Summary

As a society, we are arguably amid a renaissance of technological advancement, driven by the progress sparked by generative AI. Yet, in this period of technical innovation, it's key to remember that the success of technology is dependent on humans. AI is successful because it is developed and managed with human ingenuity, ethics, and context setting. For 15 years, AIIM has published regular market research on the state of the information management industry via its Industry Watch series. This year, we wanted to focus on the human drivers behind industry evolution. In this report, we specifically look at information management practitioners who are responsible for unstructured data to better understand the current and future states of the information management industry.

This report is designed to assess the current state of the information management industry and practice. For readers, this report provides an assessment of the current state of the information management industry, but also guidance on how to improve unstructured data management within your own organization.

This report explores the practice and practitioner of information management by highlighting three key areas:

1. *The people who practice information management;*
2. *organizational perception of information management as a practice; and*
3. *the technology organizations and practitioners are using to advance information management.*

1.1 DAWN OF THE INFORMATION LEADER

The 2024 Industry Watch: State of the Practice Report reveals the emergence of the Information Leader, a critical role in navigating the complex landscape of unstructured data management. These professionals, armed with a diverse skill set and strategic vision, are increasingly recognized as influential figures within organizations, as evidenced by their rising seniority, decision-making authority, and compensation.

UNSTRUCTURED DATA

There are two types of data – structured and unstructured. Structured data is in a tabular format, like a database. Unstructured data is nontabular and is data without a predefined data model. It goes by many names, like dark data, ugly data, or content. It's the documents, invoices, contracts, images, videos, text messages, social posts, and more.

At AIIM, we simply call that unstructured data "information." Importantly, information is vital for success with artificial intelligence (AI) and other emerging technologies. Think about generative AI applications, like ChatGPT, that use documents and text scaped from the internet.

High-quality unstructured data is vital to success with artificial intelligence (AI) and automation because it makes up a significant portion of all data generated; provides unique insights; and contributes to growth of large datasets required for AI models.

1.2 INFORMATION MANAGEMENT: A UNIVERSAL PRIORITY

This report also highlights the universal prioritization of information management across industries and organization sizes. No longer confined to large, regulated entities, effective information management has become a crucial driver of success for businesses of all types and scales. Key motivators for investing in this practice include compliance and risk mitigation, digital transformation, and cost and productivity optimization. Organizations are actively seeking ways to integrate and customize information management within their unique structures and designs.

1.3 THE EVOLVING INFORMATION MANAGEMENT TECH STACK: OPPORTUNITIES AND CHALLENGES

Finally, this report sheds light on the evolving technology stack employed by information management practitioners. As the toolkit expands, the adoption of AI and automation technologies is on the rise, with workflow and process automation, generative AI, and machine learning emerging as the most sought-after solutions. However, there are significant challenges associated with AI implementation, such as poor data quality and lack of interoperability between systems.

This year's report underscores the vital role of information leaders in driving organizational success, the universal prioritization of information management, and the ongoing evolution of the technology stack. Seventy-two percent (72%) of respondents agreed that information management will become more important in the next twelve months. As businesses navigate the challenges and opportunities presented by unstructured data, investing in skilled professionals and robust information management practices will be essential for achieving strategic objectives and maintaining a competitive edge.

INFORMATION MANAGEMENT

Information management is the management of unstructured data.

This report is focused on the intelligent information management industry, which is a systematic approach to unstructured data management that integrates people, processes, information, and technology to achieve better business outcomes. Information management practitioners manage and leverage information throughout its lifecycle, from the point of creation to disposal.

Our survey results show that the importance of information management or unstructured data management will continue to be incredibly important within organizations. Seventy-two percent (72%) of respondents agreed that information management will become more important over the next 12 months (N=282).

Dawn of The Information Leader

2. Dawn Of The Information Leader

The best way to understand the industry is by looking at the people who make the industry possible. Who is practicing information management? Who is taking responsibility for managing and, more importantly, leveraging the asset that is unstructured data within organizations?

From this year's data, it's clear that the scope of responsibilities of information management practitioners is increasing as well as their level of responsibility within organizations. The practitioner is becoming increasingly hard to define and identify by traditional job titles, like Information Manager, Information Governance Manager, or Records Manager.

What's also clear is that traditional information management professionals are no longer the only ones practicing information management and the responsibilities of information management are no longer allocated to specific, niche roles, organizations of a certain size, or specific industries.

Information management practices are evolving beyond a single profession as the practice of information management becomes a key responsibility for knowledge workers.

The data indicates a new breed of information management practitioner has emerged – the Information Leader.

Information Leaders are practitioners who are leading the management and use of unstructured data. More than just practitioners of information management, these individuals possess the skillset to understand, govern, and use invaluable unstructured data as well as the ability to effectively guide or lead change. They are not defined by job titles or traditional definitions of professions in information management, but rather by their skillsets and responsibilities within their organizations.

The respondents of this survey are largely practitioners in information management. However, as we will see in the next section, respondents are diverse and work in a variety of industries, departments, and organizations of all sizes.

2.1 INFORMATION MANAGEMENT BECOMES A CRUCIAL SKILL

In the age of AI, information management has become a crucial skill for most knowledge workers. Information literacy and data literacy are essentially interchangeable concepts, as both involve the ability to collect, analyze, interpret, and manage data effectively.

The importance of these skills is increasingly recognized by business leaders, with 90% of them citing data literacy as a key factor in company success, according to Harvard Business Review[1].

As the volume of data increases and technology stacks expand, information management will become a critical responsibility for a growing number of knowledge workers. Ultimately, it is essential for everyone to develop information literacy and become Information Leaders.

AIIM Chairman 2023-2024 Karen Hobert summarized this evolution of the role when she said, *"information management is not a role – it's a need."*

2.2 THE NEED FOR A MULTIFACETED SKILL SET

Last year, AIIM interviewed an information and records management lead for a UK government agency. When discussing how AI is changing the role of information managers, who shared that modern information managers need new skillsets on top of old skillsets. They are still managing paper records, but now also automation, AI, intelligent document processing, and more.

The lines are blurring between information management and information technology. Information management practitioners are being asked to provide technical application training and assist with AI initiatives in addition to information governance.

[1] ***Sabar, R. (2021)*** *How data literate is your company?, Harvard Business Review. Available at: https://hbr.org/2021/08/how-data-literate-is-your-company (Accessed: 06 June 2024).*

The role of an information management practitioner today requires a diverse range of skills and expertise across multiple domains. The data suggests that the most critical skills for this position include:

1. ***Information Lifecycle Management:*** *A significant majority (73.24%) of professionals are very or extremely involved in this area, highlighting its importance in the field.*
2. ***Information Governance:*** *66.85% of professionals are very or extremely involved in this practice, indicating its centrality to the role.*
3. ***Data Management:*** *Over half (57.39%) of the professionals are very or extremely involved in data management, showcasing its significance.*
4. ***Data Governance:*** *54.26% of professionals are very or extremely involved in this area, reflecting its growing importance in the industry.*
5. ***Content Classification:*** *53.28% of professionals are very or extremely involved in this practice, suggesting its relevance to the role.*

Other notable skills that are moderately to highly relevant include:

- *Metadata/Taxonomy Development and Management*
- *Retention Schedule Development*
- *Physical Records Management and Storage Solutions*
- *Policy Development*
- *Change Management*
- *Business Process Management*
- *Information Architecture*
- *Security/Data Privacy*
- *Employee Information Management Training and Awareness*

Skills such as Project Management, Business Analysis, Audit and Compliance Monitoring and Reporting, and Information Security Strategy and administration are also relevant, with moderate involvement from professionals. Emerging areas like AI Governance are gaining traction, with 41.48% of professionals being moderately to extremely involved. Less emphasized skills include Software Development and Vendor Management, with lower levels of involvement.

	Not at all involved	Slightly involved	Moderately involved	Very involved	Extremely involved
Information Lifecycle Management	3%	12%	13%	33%	41%
Data Management	6%	16%	20%	32%	26%
Data Governance	7%	14%	24%	29%	26%
Information Architecture	14%	19%	24%	24%	19%
Information Governance	5%	11%	17%	33%	34%
Business Analysis	16%	26%	23%	22%	13%
Security/Data Privacy	10%	25%	28%	25%	12%
Change Management	9%	20%	29%	25%	16%
AI Governance	36%	23%	20%	13%	9%
Software Development	48%	27%	13%	8%	5%
Project Management	12%	25%	23%	23%	17%
Policy Development	8%	19%	26%	26%	20%
Business Process Management	14%	27%	25%	20%	14%
Metadata/Taxonomy Development and Management	12%	17%	21%	24%	26%
Content Classification	11%	14%	22%	26%	27%
Retention Schedule Development	16%	19%	13%	16%	35%
Physical records management and storage solutions	23%	15%	13%	16%	33%
Audit and compliance monitoring and reporting	16%		26%	22%	17%
Information security strategy and administration	18%	28%	25%	17%	12%
Employee information management training and awareness	13%	16%	26%	20%	25%
Vendor management	27%	22%	24%	16%	11%

Figure 1. Respondent level of involvement in various information management practices. Darker shaded areas reflect higher levels of involvement. (N=359).

2.3 RISE OF THE INFORMATION LEADER: SENIORITY AND INFLUENCE EXPAND

As information management practitioner roles expand, it's interesting to note their level of involvement in system selections for information management systems.

Information management practitioners are often involved in purchasing decisions for systems and applications in their organizations. The data shows that 64.9% of professionals have either shared involvement as part of an evaluation team or serve as the primary decision-maker. Over half (51.53%) are part of a collaborative evaluation team, while 10.58% have final approval authority. Only 11.14% reported no involvement, and 23.96% have light involvement without decision-making authority. This highlights the significant role these practitioners play in influencing and shaping the selection of critical tools for effective information management within their companies.

What is your typical level of involvement in the decision making process when purchasing information management systems or applications for your organizations?

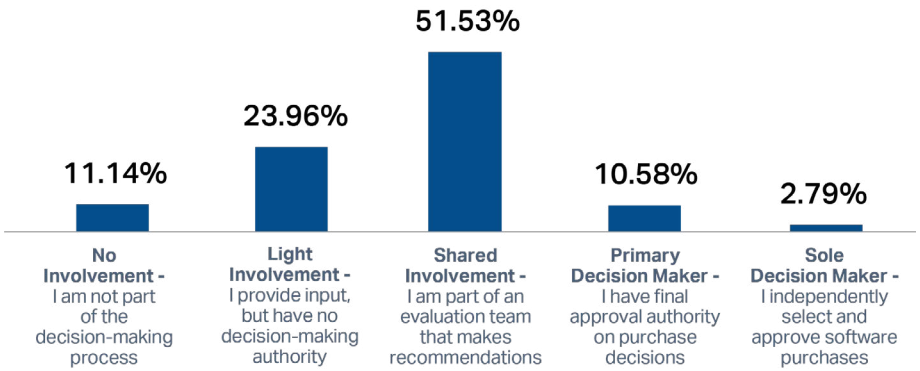
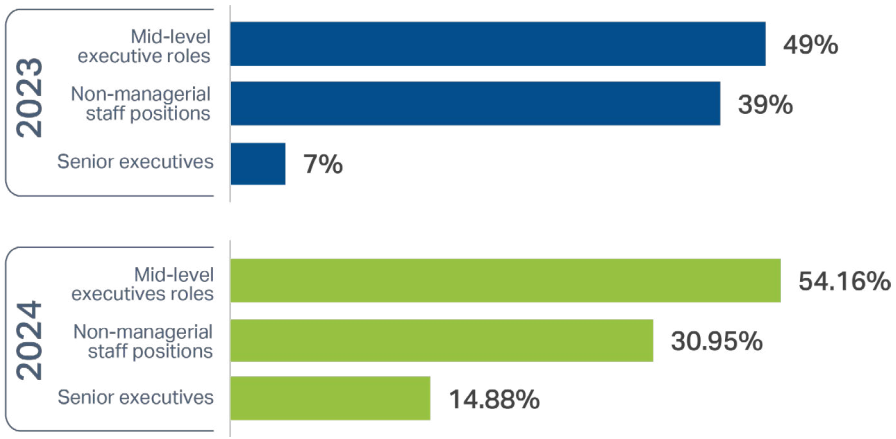


Figure 2. Respondents level of involvement in purchasing decision for information management systems (N=359).

Comparing the seniority of information management practitioners between 2023 and 2024



Comparing the seniority of information management practitioners between 2023 and 2024 reveals a notable shift towards higher-level positions. In 2023, 49% held mid-level executive roles, 39% were in non-managerial staff positions, and only 7% were senior executives. However, the 2024 data shows a significant increase in senior executives (14.88%) and mid-level executives (54.16%), while non-managerial positions decreased to 30.95%. This trend highlights the growing recognition of information management's strategic importance and the elevation of its practitioners to roles with greater decision-making authority, underscoring the rising prominence of information management professionals within organizations.

Which best describes your current position/role within your organization?

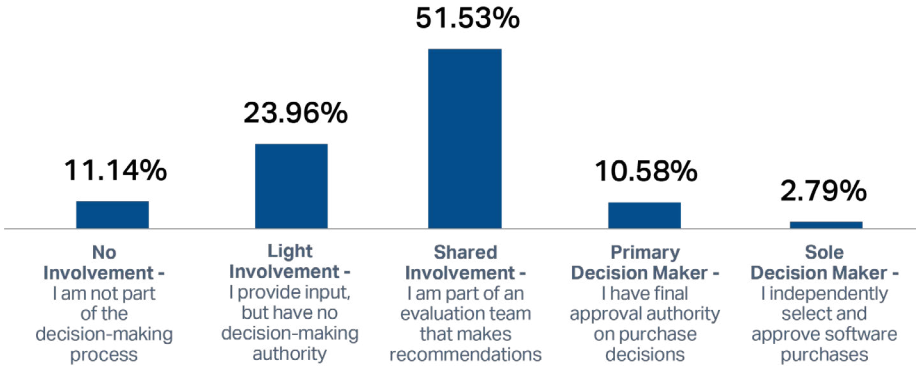


Figure 3. Level of seniority of respondents (N=336)

2.4 DIVERSIFICATION OF INFORMATION MANAGEMENT JOB TITLES

Today, information management practitioners work in a variety of departments, hold a range of different job titles, and operate at various levels of seniority. Indeed, without the title of "Information Manager" or "Record Manager", it is becoming challenging to discern if someone is an information management professional.

Only 41% of respondents hold titles associated with traditional information management professionals, such as Records Manager, Information Governance Manager, and Information Manager. Titles such as IT Director (7%), Chief Data Officer (4%), Information Analyst (4%), and Project Manager (4%) were also popular. Notably, 19% of respondents said, *"None of the above".*

Which title best describes your current role? (Please select one.)

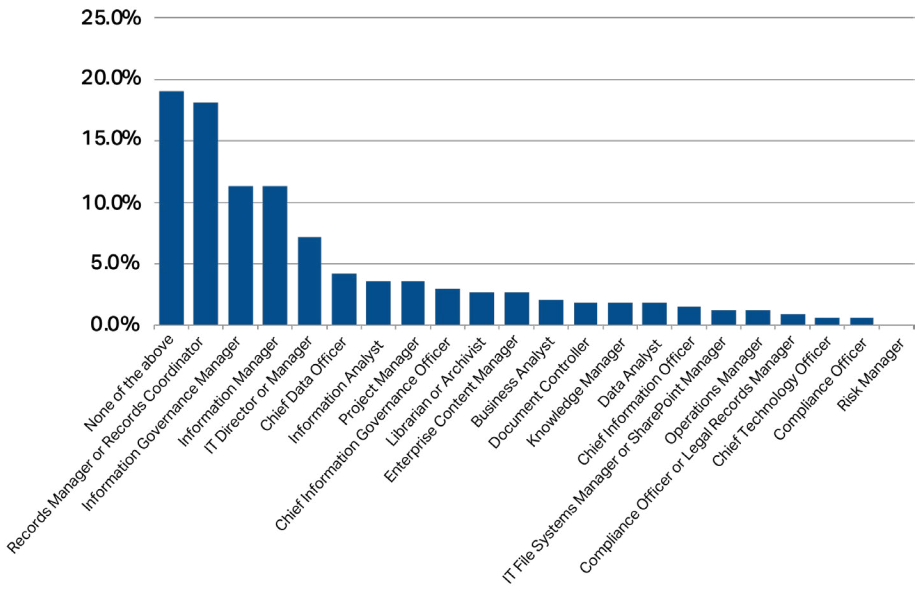


Figure 4. Titles of respondents.

2.5 THE RISING VALUE OF INFORMATION MANAGEMENT EXPERTISE: SALARIES REFLECT EVOLVING EXPERTISE

The annual salary for information management practitioners is reflective of the breadth of skills, decision-making authority, and seniority required for information leaders. Fifty-one (51%) of respondents earn above $100,000 annually. The compensation range for information management practitioners is higher than the average salary of knowledge workers in the United States, which are generally in the range of $70,000-90,000 per year. With an above average annual salary, information management is a lucrative profession that attracts wages that reflect the specific, advanced skillset required to effectively manage unstructured data.

While a career in information management is worthwhile, there is still a problem with the aging population. The median age of information management practitioners continues to rise. Seventy-six (76%) of respondents are over the age of 45.

Which compensation range best represents your individual gross annual salary, including bonuses and commissions if applicable? (Please select one.)

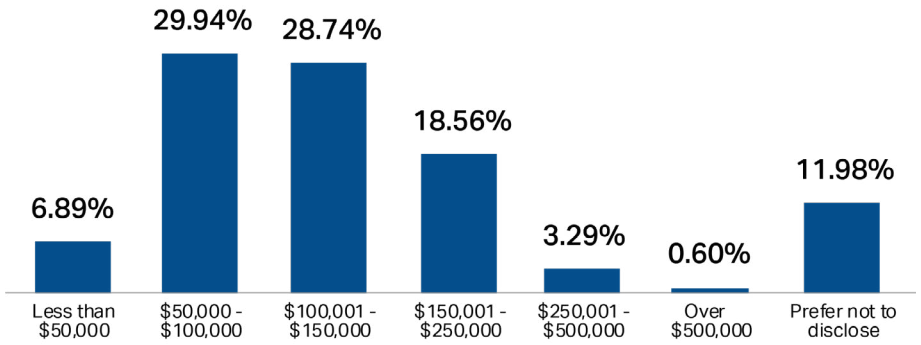


Figure 5. Respondent Compensation Range (N=334).

2.6 CONCLUSION

As organizations navigate the AI era, data and information is a vital part of enterprise success. This year's report shows the increasing prioritization of high quality and accessible data and information, which is only possible through the practice of information management. More organizations are investing in information management. Underscored by the expertise and skills of information management practitioners, these positions are increasingly senior, play a role in key strategic decisions and competitive advantage.

Information management as a practice is becoming more prevalent, but the practitioner is becoming harder to define by any singular job title or job skill analysis. We are finding that information management as a practice is becoming a part of diverse roles across the organization alongside information management professionals taking on more and more diverse responsibilities within their organizations. Contemporary information management professionals have capabilities that frequently blur the lines of technology, information, literacy, ethics, crisis management and leadership.

While the growth of information management and expansion of responsibilities makes it challenging to define the professional of today, this trends also presents opportunities.

It has created opportunities for increased influence, collaboration and interdisciplinary work. When information managers are embedded in other teams or working on cross-departmental projects, they can curate a more successful information management program by leveraging their deeper understanding of line of business needs, ethical data and information practices and desired business outcomes. It has also made the profession more accessible by introducing the practice of information management to professionals in other fields. This diversity of perspectives can spark innovation and new processes for managing information alongside an appreciation of the deep and complex responsibility for information trust, transparency and stewardship.

Anne Cornish
CEO, RIMPA Global

Information Management: A Universal Priority Across Industries and Organization Sizes

3. Information Management: A Universal Priority Across Industries and Organization Sizes

The role and responsibilities of the practitioner are defined by how their organization perceives the value of information and information management as a practice. In this year's survey, respondents were asked about their information management programs to assess the level of investment organizations are making into unstructured data management. The results show that investment in information management is surging across industries and organizations of all sizes.

3.1 ADOPTION SURGES ACROSS INDUSTRIES, IRRESPECTIVE OF REVENUE OR WORKFORCE SIZE

Information management is expanding beyond large organizations in regulated industries. The results from this year's survey demonstrate this increasing diversity. The value of information management goes beyond compliance and regulation. Harnessing unstructured data leads to better decision making, better customer experiences, and better business outcomes.

Information management practitioners still tend to work in highly-regulated industries, though. Unsurprisingly, more heavily regulated industries have the largest concentration of individuals who work either directly or indirectly in information management. Government and Public Services emerges as the largest segment at 25%, Banking and Finance represents 8%, Education represents 7% each. Energy, Oil & Gas, and Mining collectively account for 5%, as do Charity and Non-Profit organizations, while Healthcare represents 4% of respondents. Yet, Figure 2. Respondents by industry. (N=405) demonstrates the breadth of cross-industry adoption of information management practices.

What option best describes your organization's primary industry?

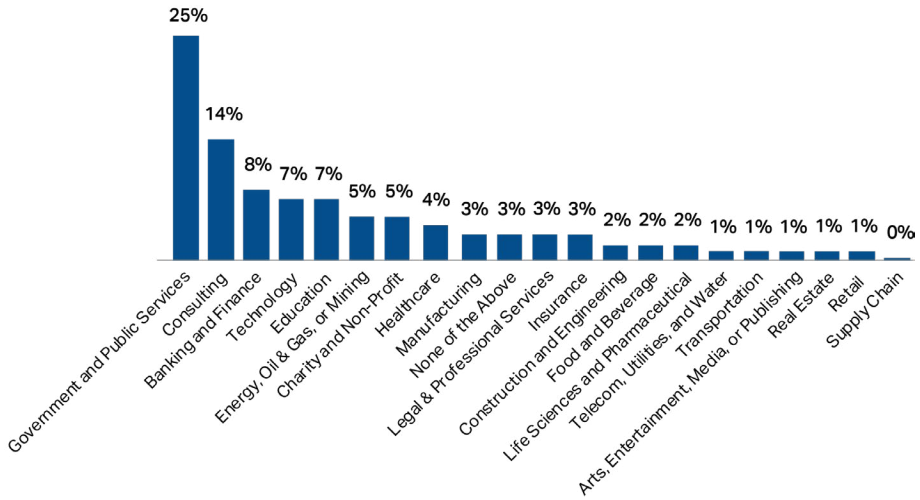


Figure 6. Respondents by industry. (N=405)

What's notable in this year's report is the increase in respondents from small and mid-size organizations. As the cost of information management systems continues to decrease and the importance of unstructured data management to achieving strategic goals increases, it's clear that organizations of all sizes see the benefit in retaining information management practitioners.

Approximatley how many total employees work at your organization across all branches?

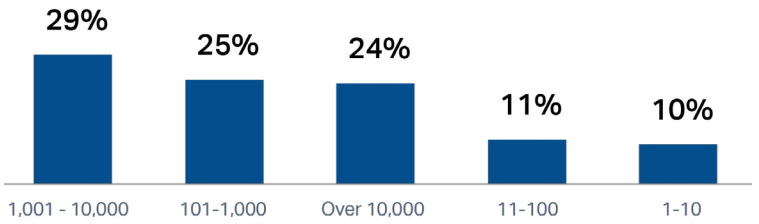


Figure 7. Number of total employees at respondents' organizations. (N=403)

Similarly, the reported total organizational annual 2023 revenue indicates that organizational size is no longer a predictor of which organizations are interested in information management.

What was your organization's approximate total revenue last year?

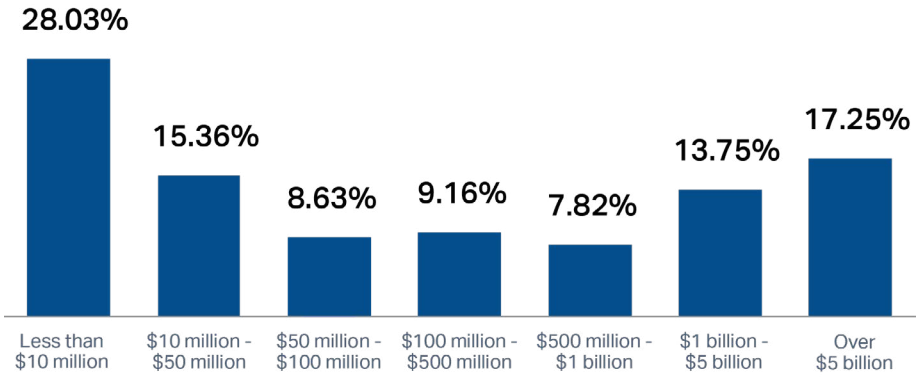


Figure 8. The total organizational revenue from 2023. (N=371).

3.2 ORGANIZATIONS INVEST IN INFORMATION MANAGEMENT

As a sign of increasing economic pressures and rising costs, the reasons behind investing in and prioritizing information management have shifted since 2023.

In 2023, AIIM found that the top three organizational goals related to information management were compliance (30%); customer service (16%); and costs and productivity (11%). In this years' survey, respondents were asked more directly to provide input on the top three reasons their organization invests in information management.

The top three most popular reasons for investing in information management in 2024 included Compliance & Risk (70%); Digital Transformation (38%); and Costs and Productivity (37%). All three areas, even Digital Transformation, are about reducing risks and costs. This increased emphasis could be due to a larger percentage of information management practitioners responding to this year's survey, but also could reflect the economic slowdown of the past year and a desire amongst organizations to avoid costly violations. Interestingly, Customer Service moved down to the fifth most prevalent reason behind investment at 25%. Information Leaders can use these reasons or drivers to gain buy-in and budgetary support for new projects and information management programs within their organizations.

What are the top three reasons your organization invests in information management? (Please select three.)

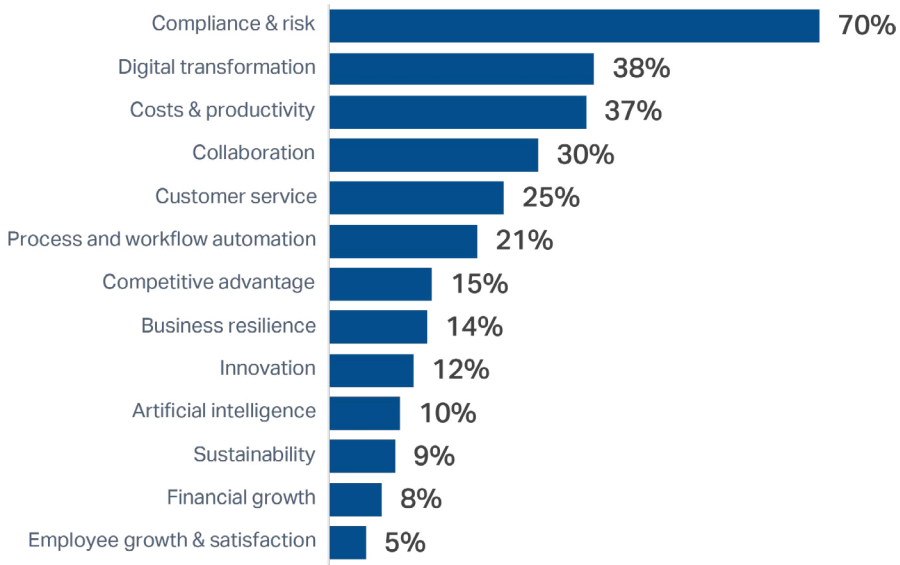


Figure 9. Top three reasons for organizations investing in information management (N=265).

Reasons for investing change based on perspectives. AIIM has spoken with many solution providers and system integrators in the past year who report that sales are not being made by focusing on compliance and risk, but instead focusing on business outcomes.

Consultants and Suppliers of Information Management Software or Services were excluded from survey results, but their response to this question was interesting because they put less weight on compliance & Risk (52%) while it was still the top cited reason for investment. Thirty-eight percent (38%) of solution providers who responded to the survey also selected Competitive advantage and 35% selected Costs & Productivity as primary reasons for investing in information management.

3.3 CUSTOMIZED ROLES AND PRACTITIONER-DRIVEN APPROACHES TAKE CENTER STAGE

Within organizations, what does information management as a practice look like? Where do information management practitioners work and contribute value within the organization?

Most information management practitioners still work in Information Technology (16%) or Information Management/Records Management/ Information Governance (54%) departments. This is comparable to previous year's findings. Yet, you will also find information management practitioners in Legal (6%), Administration (6%), and other departments. Amongst the 9% percent of respondents who selected "Other", they specified working in departments like Strategy, Transformation, Data Analysis, and Research.

Which department do you currently work within at your organization?

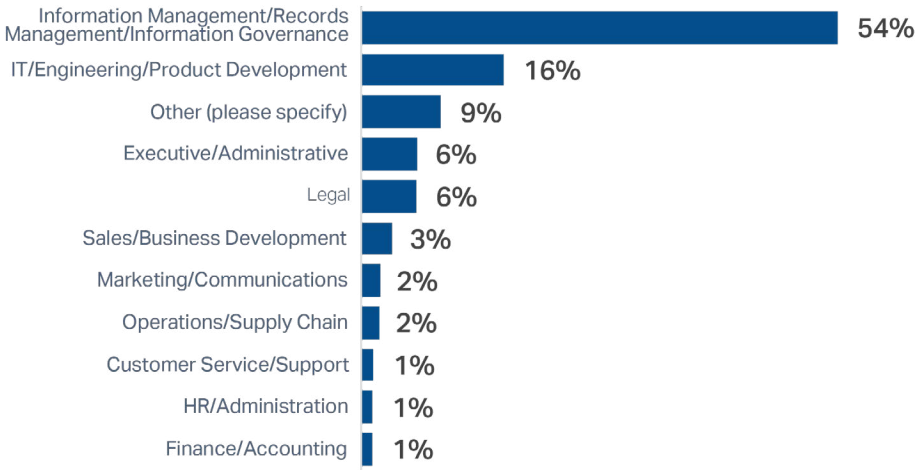


Figure 10. Departments where respondents work. (N=361).

Organizations are customizing how and where information management practitioners integrate with the larger enterprise based on specific needs.

When examining how information management fits in organization design in less regulated industries, such as Arts, Retail, and Manufacturing, there is a notable drop in the use of traditional titles (26.97%) as well as greater diversity in the departments where information practitioners work. Within less regulated industries, practitioners could be found primarily working in Information Management departments (33%), IT (24%), and Legal (10%).

While the role of the professional has becoming increasingly harder to define, it's clear that the practice and importance of information management is expanding across industries and organizations.

3.4 A SHORTAGE OF INTERNAL INFORMATION MANAGEMENT TALENT

Information management will become increasingly important over the next twelve months. Growth in data volume, expanding technology stacks, and the increasing need for unstructured data management is becoming more pronounced as organizations increase adoption of AI and automation. Yet, the results of the survey indicate there may be pronounced talent shortage of information management practitioners in the next few years due to an aging population and limited full-time staff dedicated to information management.

The population of information management professionals is aging with nearly 76% of respondents above the age of 44.

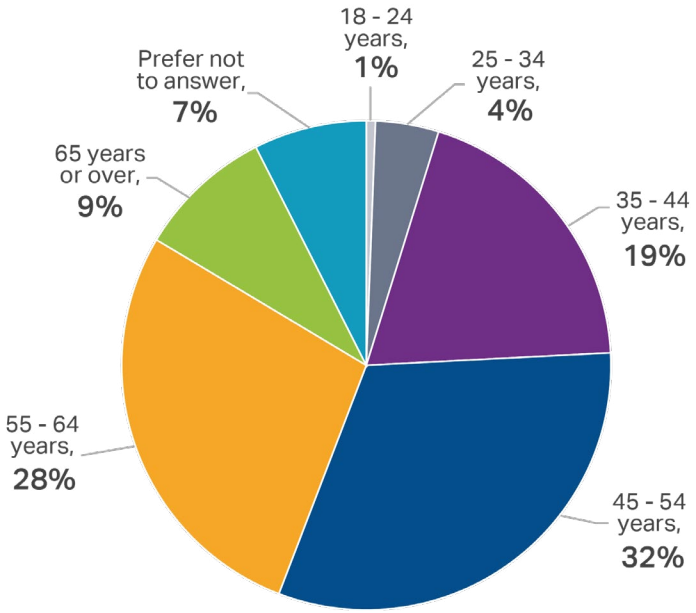


Figure 11. Age range of respondents (N=335).

Most organizations (53%) have less than 9 employees dedicated to information management within their organizations. Five percent (5%) of organizations have no full-time employees dedicated to information management.

While most knowledge workers should possess information management skills, organizations can better leverage their unstructured data with Information Leaders to champion and lead information management efforts. Organizations should assess their internal skillsets and identify the employees who can lead information management programs.

How many full-time employees are dedicated to information management roles and responsibilities at your organization?

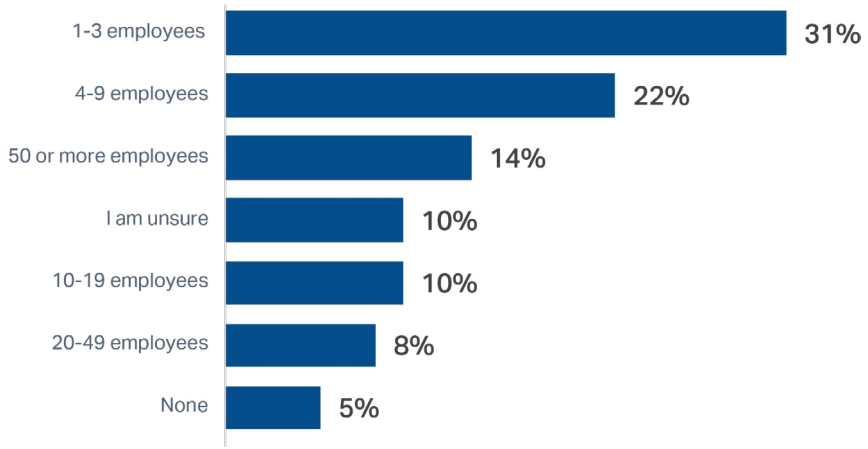


Figure 12. Number of full-time employees dedicated to information management (N=263).

3.5 LACK OF KEY AI ERA SKILLS IMPACTS ORGANIZATIONAL EFFECTIVENESS

In addition to a talent shortage, organizations may also be facing a gap in required skillsets. Respondents were asked to rate the internal information management skillsets in their organization. The weakest areas where respondents tended to feel that their organization mainly had no proficiency or beginner level proficiency were in artificial governance; process and workflow design; and records management.

What is concerning about this lack of proficiency is most organization are planning investments and implementation in generative AI; Workflow and process automation solutions; and Records Management Solutions in the next 1-3 years. Training can be accomplished during software implementation, but generally it's a best practice to have internal skillsets to provide ongoing, operational support for a technology platform before making a significant investment. This helps ensure the sustainability of the product within an organization.

How would you rate these internal skill sets in your organization?

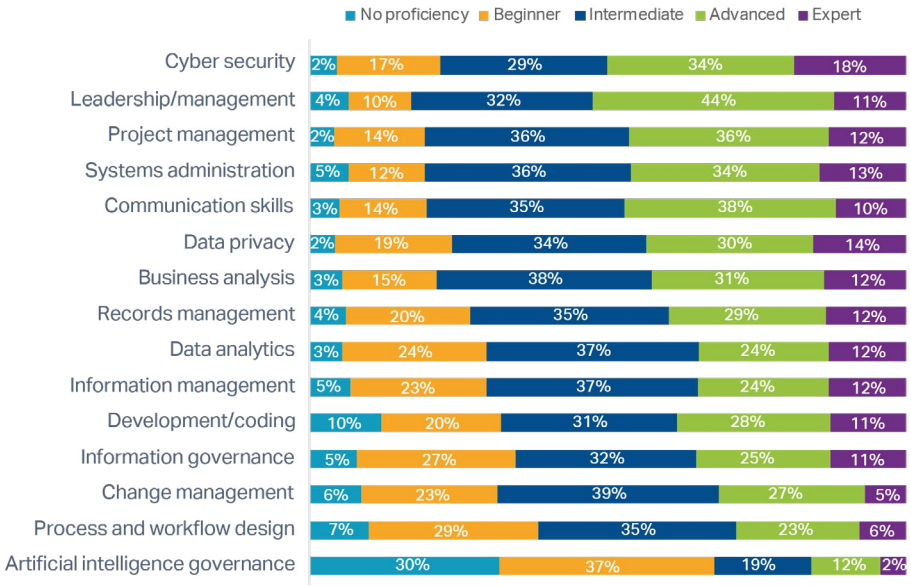


Figure 13. Internal skillsets in organizations (N=255).

Skill gaps impact effectiveness across different information management initiatives withing organizations.

The areas where organizations are least effective are generative AI use and governance, knowledge management, extracting data and intelligence from information, long-term information preservation, and workflow and process automation. Most employees lack advanced skills in using and governing generative AI, according to a survey. Only 31% of respondents felt their organization had more than beginner-level proficiency in these areas. Knowledge management also shows a significant lack of proficiency, with 10.76% of organizations having no proficiency and 32.27% at the beginner level. The other mentioned areas have around 10-13% of organizations with no proficiency and a significant portion at the beginner level.

On the other hand, areas like information security and privacy, information access and use, creating and capturing information, and risk management show higher levels of proficiency, with a larger percentage of organizations at the intermediate, advanced, and expert levels. The data suggests that organizations need to invest in training and development to enhance their information management capabilities.

Investment in particular building particular skillsets should follow strategic goals. For example, if an organization is intentionally investing in adopting generative AI, employees need training in generative AI use and governance, but also the fundamental skills that support successful AI programs. These include the ability to manage information throughout its lifecycle; extracting data and intelligence from information; and data/information findability and discovery. When these skillsets are lacking, employees don't have the knowledge to find information and data to train models. Employees may also be unable to provide appropriate AI governance and responsibly manage AI input and output. They may also lack the literacy to be able to interpret information and use it to make better decisions.

Figure 14. Organizational effectiveness in information management initiatives (N=256).

3.6 CONCLUSION

At AIIM, we have spent the past year identifying and talking about orthodox beliefs, or negative assumptions we hold about the world around us. This year's report calls into question an orthodox belief held by the information management industry: that information management systems and programs are only accessible to large organizations with substantial resources.

The reality is that information management systems and technologies have become more affordable and accessible to organizations of all sizes, across industries. We have moved past the days of monolithic electronic content management (ECM) systems operated by a select few and instead find customized, diverse technology stacks and information management programs that are tailored to each specific organization.

Organizations are either riding or trying to catch the AI wave. Success with AI is dependent on the ecosystem of people, processes, and data within an organization. AI adoption cannot happen in isolation. If your organization lacks the ability to manage and leverage unstructured data to use for AI and manage the output of AI, you are missing the foundation of your AI program.

As you read this research, I encourage you to evaluate your own information management program. How does your program compare to the average organization? Do you have the appropriate number of staff to adequately manage the increasing volume of data within your organization? Does your staff have sufficient skills and knowledge to manage and leverage unstructured data to advance your strategic goals? Do you have Information Leaders within your organization who can guide AI and automation strategies and lead your information management programs?

Tori Miller Liu, CIP
President & CEO
Association for Intelligent Information Management

Information Management Technology: Tools of the Practitioner

4. Information Management Technology: Tools of the Practitioner

4.1 THE TECHNOLOGY

What are the tools in use by today's information practitioner? The information management practitioner of today is managing or working with an ever-growing stack of information management technology systems and data volume. They are also working to enable artificial intelligence (AI) and automation within the enterprise. This section highlights both the opportunities and challenges information leaders face with today's information management technology and data.

4.2 THE EXPANDING INFORMATION MANAGEMENT TECHNOLOGY STACK

Information management systems are any software application that is used to manage unstructured data. AIIM has been tracking the size of the information management technology stack since 2013. The number of organizations using 7-10 system has risen from 3.6% in 2013 to 6.2% in 2018, and 14.42% in 2023 — approximately doubling every five years. In the results of our 2024 survey, we found that an average of approximately 10.39 information management systems are used per organization.

When respondents were asked which information management tools their organization uses or plans to use, the results revealed that currently the most popular information management systems are Secure File Sharing (90% currently use); Collaboration Tools (88% in use); and Employee Intranet (83%). The move to remote work accelerated adoption of systems in these categories.

In contrast, the least popular systems currently employed are Enterprise Search (67% no plan to use); Digital Asset Management (59% no plan to use); and Document Capture/Intelligent Document Processing (57% no plan to use). It could be argued that all three types of systems may be less popular because they solve very specific problems. For example, a graphic design firm or magazine publisher may have need for a large repository of multimedia and, thus, require a Digital Asset Management system, but for other organizations secure files sharing may suffice as a means to manage multimedia.

Respondents also indicated which systems their organization plans to use withing 12 months or 13+ months. The most popular system for future use is generative AI with 36% of respondents sating their organization would use generative AI as an information tool in the next 12 months or 13+ months. This could mean that within two to three years, up to 81% of organizations may be using generative AI for information management.

Next, 26% of respondents said their organization plans to use a Workflow and Process Automation solution. Twenty-six (26%) of respondents plan to use a Records Management solution in the next 12 months or 13 or more months. These would be the system categories that may experience growth in revenue in the next one to three years and are three systems organizations should consider for use when evaluating their information management tech stack.

Which information management tools do you use (or plan to use) within your organization?

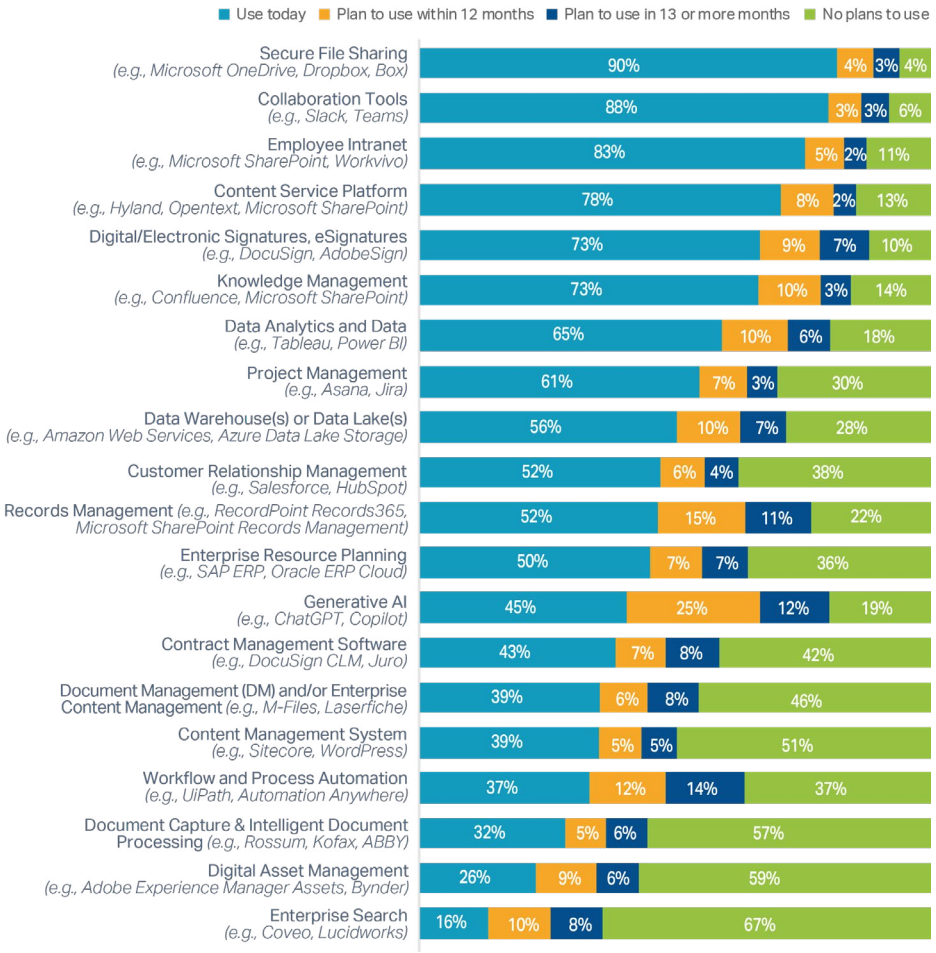


Figure 15. Information Management Systems currently in use within respondents' organizations (N=283).

4.3 USE OF ARTIFICIAL INTELLIGENCE, AUTOMATION AND MACHINE LEARNING IN SUPPORT OF INFORMATION MANAGEMENT INCREASES

Information management systems employe a variety of technologies to better manage content and processes. Respondents were asked about which technologies their organizations use to support information management. Usage of most technologies remained relatively the same compared to 2023 results. Notably, there significant jumps in usage of AI and automation technologies.

Usage of workflow and process automation increased by a whopping 28% from 2023 to 2024. Less dramatic but still significant, usage of generative AI increased by 5% and machine learning increased by 8% in the same time period. Low/No-code Development usage increased by 6% and usage of data analytics increased by 5%.

The five most prevalent technologies in use today are Document/Data encryption (63%); Data Analytics (61%); Optical Character Recognition (60%); Content/data migration (52%); and Workflow and Process Automation (50%).

Looking ahead, respondents also indicated which technologies their organization plans to use to support information management within 12 months or more. These are the top five technologies your organization should consider for future use based on the data:

1. ***Generative AI*** *(51% plan to use within 12 or more months)*
2. ***Metadata Enrichment*** *(42% plan to use within 12 or more months)*
3. ***Machine Learning*** *(16% plan to use within 12 or more months)*
4. ***Content Analytics*** *(34% plan to use within 12 or more months)*
5. ***Workflow and Process Automation*** *(33% plan to use within 12 or more months)*

Which of the following technologies does your organization use to support information management?

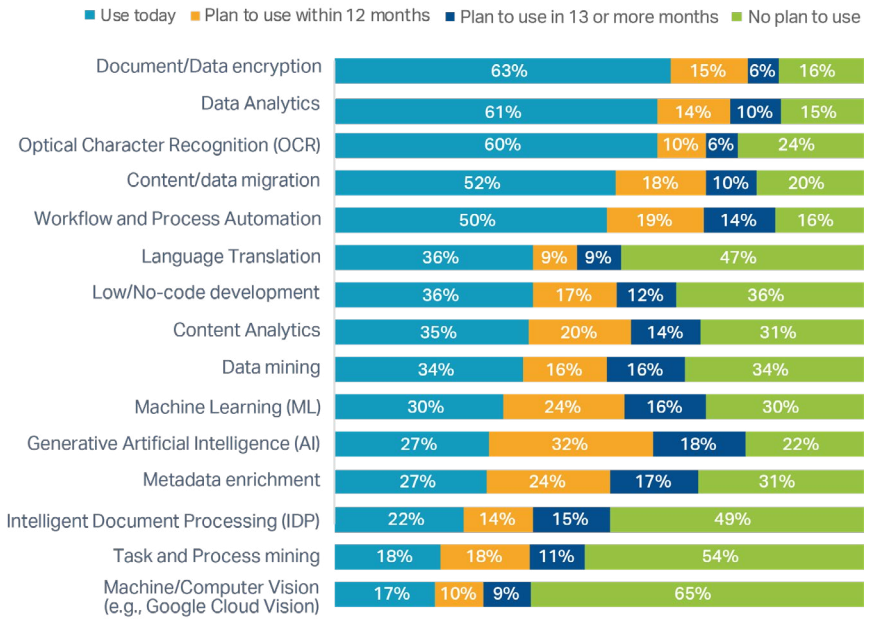


Figure 16. Organization use of information management technologies (N=262).

4.4 STATE OF AUTOMATION MATURITY

Workflow and process automation is one of the most effective information management technologies an information management practitioner and organization can use. AIIM defines workflow and process automation as the use of technology to automate and streamline business processes and workflows. This involves designing, executing, and automating processes that involve tasks, information, and people, with the goal of improving efficiency, accuracy, and productivity.

Workflow and process automation is a key component of digital transformation initiatives and is closely tied to other information management practices, such as document management, content management, and data governance.

While the term “digital transformation” may not be as prevalent in discussions as it once was, this does not necessarily indicate that organizations have completed their digital transformation journey. The survey results reveal that there is still significant room for growth in automation within organizations.

The survey findings suggest that although companies may have achieved a paperless environment, the level of automation within most organizations remains at a basic level. Only 33% of respondents reported having integrated systems or workflow and process automation in their team or department. Only 3% of respondents reported their team or department having attained workflow and process automation where advanced automation via Robotic Process Automation (RPA), and Artificial Intelligence/Machine Learning (AI/ML) technologies.

To improve operational efficiency, organizations should invest in advancing automation, moving beyond manual processes and basic desktop tool automation to more advanced solutions such as integrated systems and workflow and process automation.

What is the current level of process automation within your team or department? (Please select the one response that best applies.)

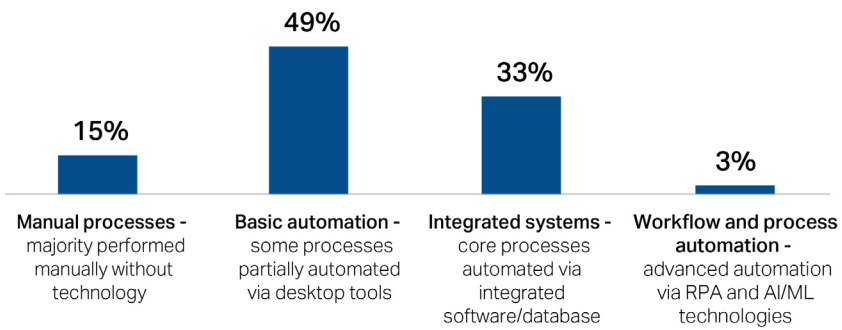


Figure 17. Automation maturity within organizations (N=238).

Another way to assess organizational maturity in automation is the level of automation of core business processes.

The data reveals that the areas with the highest levels of automation, combining both partial and highly automated processes, are Finance - Accounts Payable (59.73%), HR - Employee Onboarding & File Management (51.79%), and Product & Service Delivery (46.37%). These departments have successfully implemented automation technologies, reducing the need for manual intervention in a significant portion of their processes. Content Management (45.12%) and Customer Service & Support (48.85%) also show promising levels of automation, with a substantial percentage of their processes being either partially or highly automated.

The areas with the most potential for automation, based on their high percentages of manual processes, are Procurement & Supply Chain (62.20%), Legal - Contracts Management (58.69%), and Operations - Digital Mailroom (68.97%). These departments have a significant proportion of entirely manual or mostly manual processes, presenting substantial opportunities for organizations to streamline operations and boost efficiency through the implementation of automation technologies. By focusing on these areas and investing in automation solutions, companies can unlock the potential for increased productivity, cost savings, and improved overall business performance.

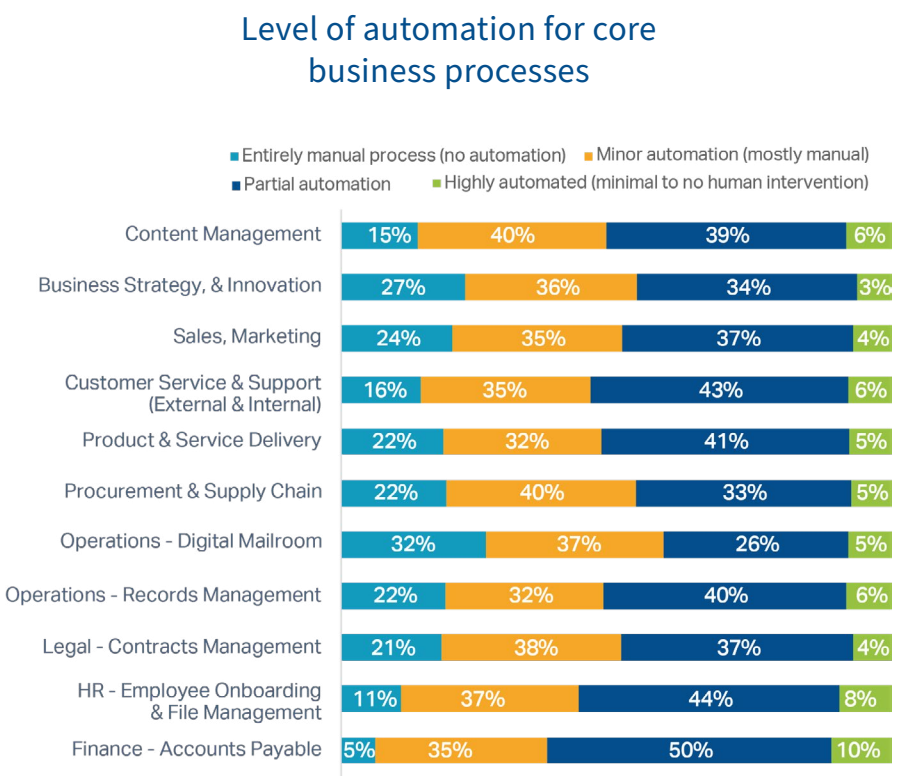


Figure 18. Level of automation of core business processes (N=231).

4.5 OPPORTUNITIES FOR PROCESS-SPECIFIC AUTOMATION

Where do we find automation in use within organizations? When asked which process-specific automation are used or plan to be used within their organizations, respondents identified three top areas for process-specific automation:

1. ***Accounts Payable Automation:*** *54.66% of respondents are already using this type of automation, with an additional 17.81% planning to implement it within the next 12 months or beyond.*
2. ***Human Resources (HR) Process Automation:*** *47.79% of respondents currently use HR process automation, and another 21.69% plan to adopt it within the next 12 months or later.*
3. ***IT and DevOps Automation:*** *42.15% of respondents have implemented IT and DevOps automation, with an additional 22.31% planning to use it in the future.*

These three areas stand out as the most widely adopted and sought-after process-specific automation solutions, highlighting the focus on streamlining back-office functions, improving employee experience, and enhancing IT operations efficiency.

Based on the total planned adoption percentages, the top three areas that will likely experience the most growth in the future are:

1. ***Contract Management Automation*** *(30.96%)*
2. ***Customer Service Automation*** *(25.31%)*
3. ***Financial Reporting and Consolidation Automation*** *(23.33%)*

These areas show the highest combined percentages for planned adoption within the next 12 months and beyond, indicating a strong interest in automating contract management, customer service, and financial reporting processes in the near future.

Which process-specific automation do you use (or plan to use) within your organization?

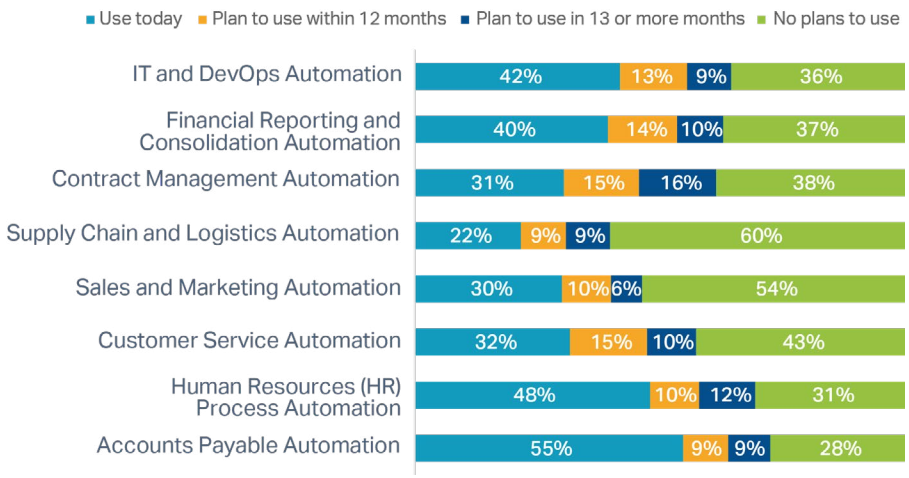


Figure 19. Process-specific automation in use (N=261).

Automating work and empowering a new workforce has become a competitive advantage for organizations in today's digital landscape. By implementing automation, companies can create operational efficiency, increase productivity, and remove digital friction, allowing employees to focus on tasks that require uniquely human skills.

When considering what to automate, organizations should prioritize high-value, repetitive tasks that can be streamlined through technology. Additionally, identifying known, high-quality datasets and data repositories with available integrations is crucial for successful automation implementation.

By strategically automating the right processes and leveraging reliable data sources, businesses can unlock the full potential of their workforce and gain a significant edge over their competitors.

4.6 QUESTIONABLE AI READINESS FOR ORGANIZATIONS

Automation is greatly enhanced by the incorporation of artificial intelligence (AI), which adds intelligent data processing, decision automation, and the ability to automate repetitive tasks. This combination of automation and AI has the potential to significantly improve productivity across various industries.

The question remains, though: how prepared are organizations to integrate AI into their existing systems and workflows?

Adopting AI in the enterprise requires careful planning, investment in infrastructure, and a clear understanding of the technology's capabilities and limitations. As businesses navigate this new landscape, they must assess their readiness to embrace AI and develop strategies to successfully harness its power for maximum benefit.

The first step towards readiness with any emerging technology is awareness. Promisingly, 51% of respondents said their organization is familiar with AI capabilities that could be applied within information management.

DIGITAL FRICTION

Digital friction refers to the barriers or inefficiencies faced during a stakeholder's digital experience.

Removing digital friction can have significant financial impact on the organization. In OpenText's 2023 research on the topic, 58% of respondents indicated they had lost business opportunities due to lack of timely access to data while 82% reported that technology is to blame for delays and missed deadlines.

Source: OpenText report Digital Friction Holds Back Today's Businesses

How familiar is your organization with AI capabilities that could be applied within information management?

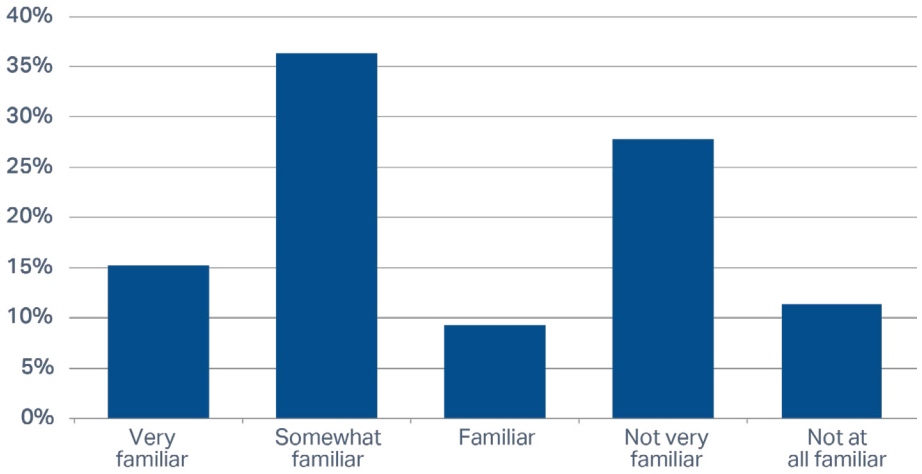


Figure 20. Level of familiarity with AI capabilities for information management processes (N=237).

Awareness isn't enough to feel prepared to tackle a new technology. Respondents were asked to assess their personal preparedness to take advantage of AI capabilities as well as the preparedness of their team and organization. What is interesting about the responses is that the perception of preparedness decreases from individual, to team, to organization. 57% of respondents feel very prepared or somewhat prepared for AI, but only 44% felt the same about their team; and only 35% felt the same about their organizations.

Please indicate the level of AI preparedness for each group below.

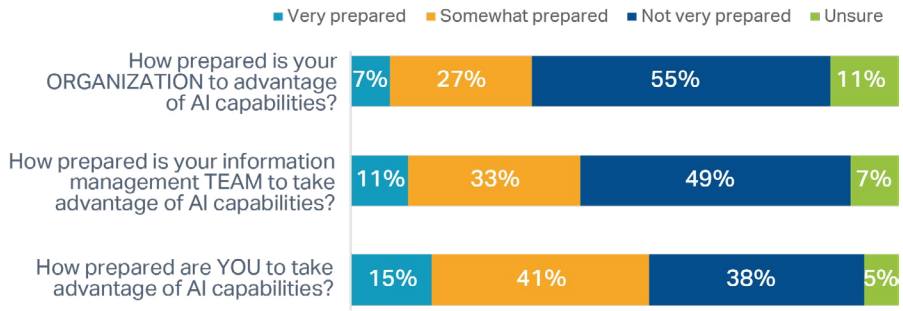


Figure 21. Level of preparedness for individuals, teams, and organizations (N=234).

Two major barriers for preparedness of AI, usage to enhance information management at an enterprise-level, are data quality and lack of interoperability.

4.7 DATA QUALITY REMAINS SIGNIFICANT OBSTACLE TO AI ADOPTION

Data quality is a significant hurdle for organizations looking to implement artificial intelligence (AI) and machine learning applications. The majority of respondents (77%) rated their organizational data as either average, poor, or very poor in terms of quality and readiness for AI. This finding aligns with AvePoint's 2024 research[2], which revealed that although 80% of organizations believed their data was AI-ready, nearly every organization surveyed (95%) faced data challenges during AI implementation, with over half (52%) encountering issues related to internal data quality and organization.

How would you rate the overall quality and readiness of your organization's data for artificial intelligence (AI) and machine learning (ML) applications?

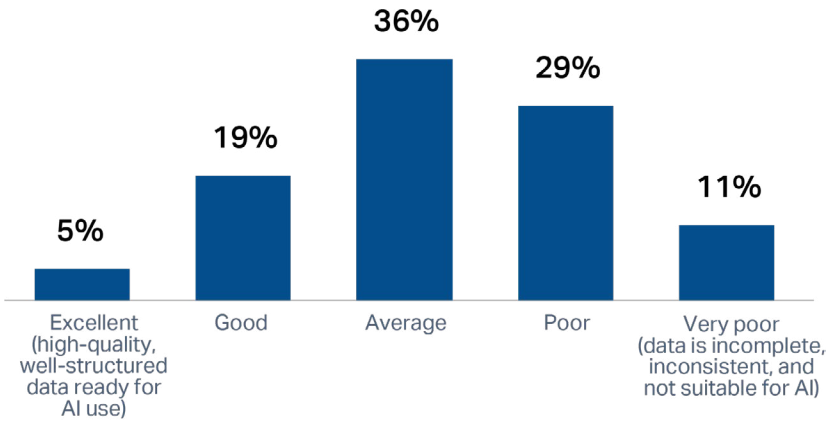


Figure 22. Overall quality and readiness of data for AI (N=230).

The survey data reveals that organizations face a myriad of data quality issues, hindering their ability to effectively utilize their data assets. The most prevalent problem is siloed or fragmented data sources (76.42%), which can lead to inconsistencies, duplication, and difficulty in accessing and integrating data across the enterprise.

Closely following this issue is the presence of duplicate, redundant, or ROT (redundant, obsolete, or trivial) data (75.98%), which not only consumes valuable storage space but also compromises data integrity and decision-making processes.

Lack of data standardization (69.43%) and missing or incomplete data (68.56%) are also significant concerns, as they can result in inconsistent data formats (63.32%) and inaccurate data (44.10%).

[2] ***AvePoint. (2024).*** *AI & Information Management Report The Data Problem That's Stalling AI Success (pp. 16–17).*

Which of the following data quality issues are present in your organization's data? (Please select all that apply.)

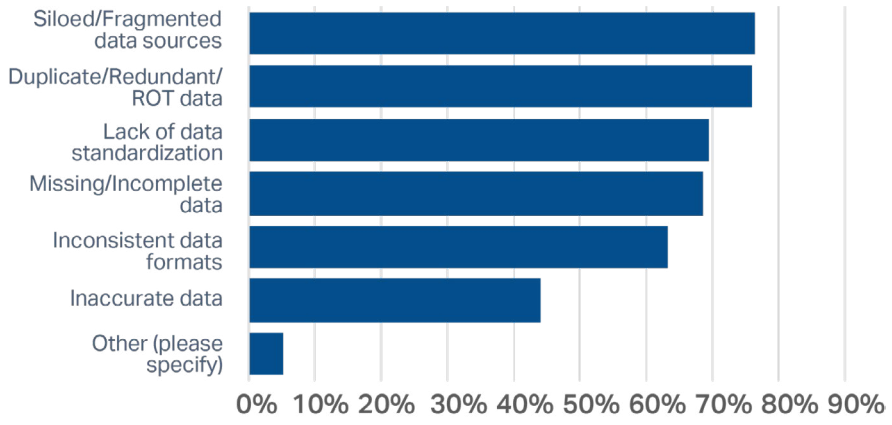


Figure 23. Data quality issues faced by organizations (N=229).

A root cause of poor data quality for AI is often the absence of dedicated data hygiene processes. Our survey found that only 23% of organizations had specific processes in place to prepare data for AI, such as addressing missing data, outliers, data standardization, data augmentation, and tackling data bias. To ensure successful AI implementation, organizations must prioritize establishing robust data quality monitoring, cleansing, and preparation processes specifically tailored for AI model training and deployment.

Does your organization have established processes for data quality monitoring, cleansing, and preparation specifically for AI model training and deployment?

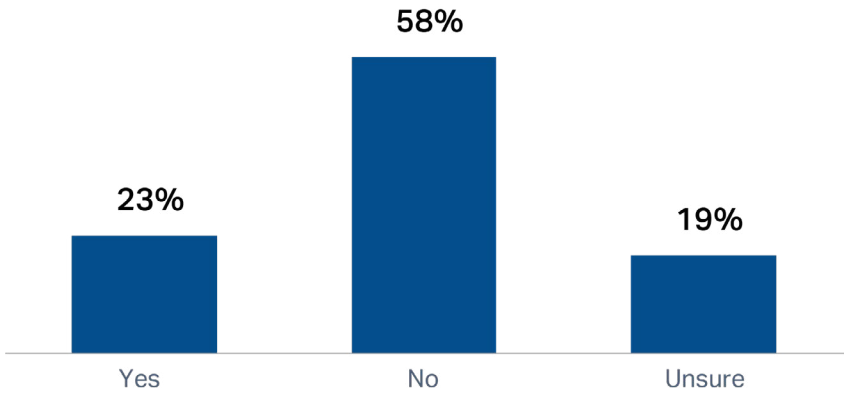
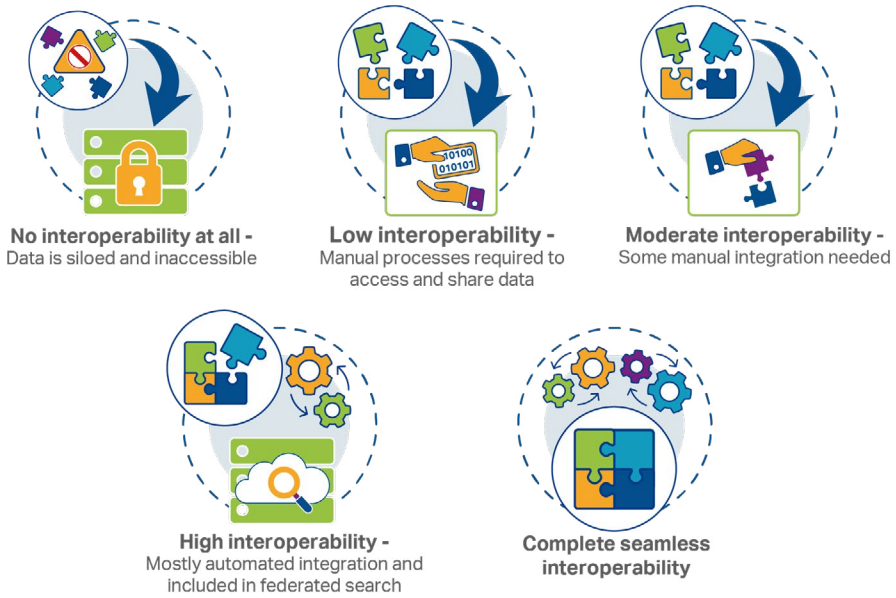


Figure 24. Established data quality processes (N=235).

4.8 INTEROPERABILITY POSES BARRIER FOR AI AND INFORMATION MANAGEMENT

The survey results reveal a significant challenge for AI adoption as well as effective management of unstructured data: access to data.

Levels of Interoperability



Over 50% of respondents reported either no interoperability or low interoperability for critical systems such as Knowledge Management, Content Management, Digital Asset Management, and Generative AI. While collaboration tools, data analytics, and employee intranets showed higher levels of interoperability, the survey highlights the need for organizations to prioritize the integration of their information management systems to unlock the full value of their data and enable more powerful AI applications.

This lack of integration between systems and data repositories makes unstructured data management on an enterprise level challenging, but also means that vast volumes of valuable data remain siloed and inaccessible to AI models. Without seamless interoperability, organizations are unable to fully leverage the potential of their data assets, hindering the effectiveness of AI implementations.

What is the level of interoperability of information management tools used by your organization?

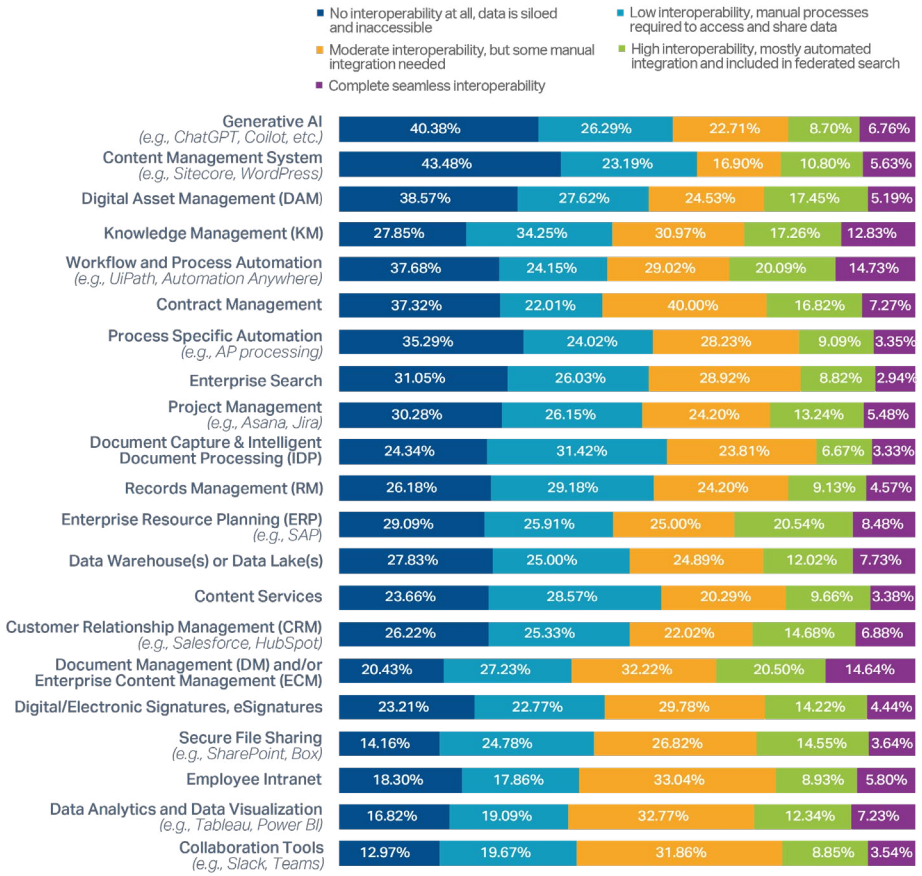


Figure 25. Levels of interoperability (N=258).

4.9 OPPORTUNITIES FOR AI APPLIED TO INFORMATION MANAGEMENT

One of the main obstacles to successful AI adoption and a sense of readiness is the absence of a well-defined strategy. When developing an organizational strategy for AI, it's crucial to prioritize the specific problems that need to be addressed, rather than fixating on AI as a tool itself.

To gauge your organization's current use of AI to better manage unstructured data, respondents were asked to share how their organization was currently leveraging or planning to leverage AI to improve a variety of information management processes. The data identifies several prevalent use cases for AI in information management.

Based on the data provided, the most popular use cases for AI in information management are information creation or generation, content generation, and automation. Information creation or generation has the highest percentage of organizations currently using AI at 21.36%, followed by content generation at 18.72% and automation at 14.81%.

Looking at the combined percentages of organizations currently using AI and those planning to use it within the next 12 months, information creation or generation remains the top use case at 49.54%. Automation follows closely at 43.05%, while monitoring security protocols comes in third at 42.59%.

It's worth noting that all the listed use cases show significant interest in AI adoption, with each having over 65% of organizations either currently using, planning to use within 12 months, or considering using AI in 13 or more months. This data suggests that AI is being increasingly recognized as a valuable tool across various aspects of information management. However, the high percentages in the "No plan to use" column for several use cases, such as data hygiene (34.43%) and knowledge management (31.34%), indicate areas where organizations may be hesitant to implement AI solutions. This hesitancy could be attributed to lack of scalable solutions for that use case, lack of clear return on investment, or competing priorities.

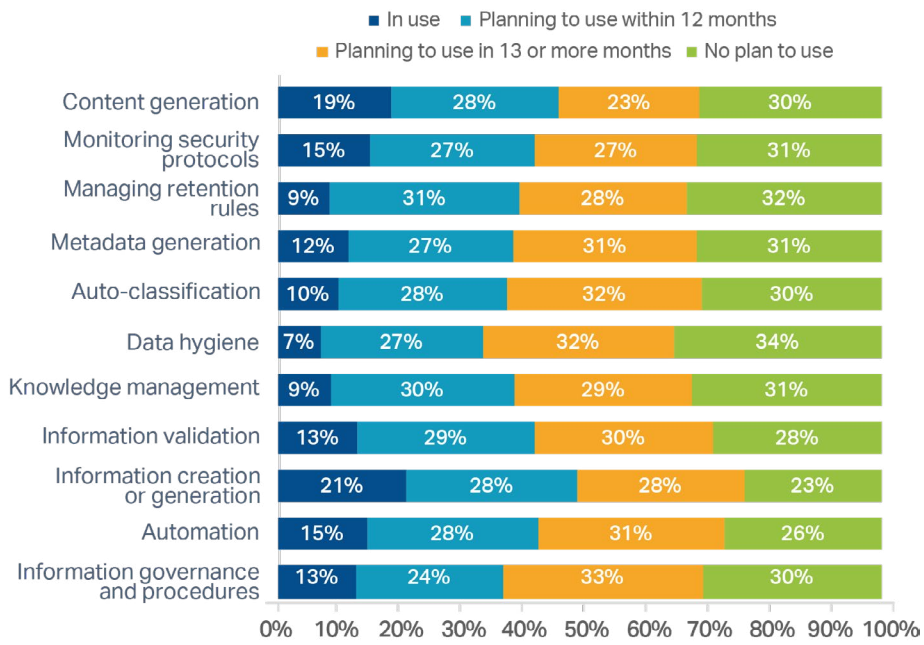


Figure 26. How organizations are currently leveraging or planning to leverage AI to improve information management processes (N=228).

4.10 CONCLUSION

Examining the tools of the practitioner is a key component to our understand of the state of the practice in today's increasingly complex data/information management world.

It was noted that the number of systems that organizations plan to use or actually uses continues to increase. This presents a training/ skillset challenge for organizations as search to attract and retain talent remains frustratingly difficult. This is compounded by varying levels of technological maturity across the landscape

A parallel trend is the lack of success in the enterprise search category. Our vendor partners need to reinvigorate their efforts to provide value-based solutions. Further down the adoption curve are some old standards, ERP, CRM, Workflow. All of these will need to demonstrate value given their relatively high investment costs, poor track records, and outright dependance on high quality data/information.

Planning for the next 12 months, the role of governance must mature rapidly in order to keep up with the projected demands of metadata, ML, analytics, and workflow automation. While everyone is familiar with GIGO, simply supplying the organizational workforce with additional high quality data is not enough. Data literacy needs highlighted and resolved by governance are also necessary to ensure that the workforce understands 1. The role of high quality data as inputs to these tools and 2. How to use these tools is ways that support the knowledge worker, the workgroup and the organization.

When it comes to Generative AI, employees are increasingly adopting it (sometimes in the face of active organizational discouragement or prohibition) but its allure to provide individual productivity gains seems irresistible. The survey highlights a growing interest in AI for information management tasks. Organizations are recognizing the potential of AI to automate processes, generate content, and improve information creation. However, challenges like data quality and system interoperability must be addressed for successful AI adoption. Organizations need to prioritize data hygiene practices and invest in system integration to unlock the full potential of AI in information management.

Overall, the information management technology stack is rapidly expanding, with AI and automation playing an increasingly crucial role. However, data quality and interoperability challenges must be addressed for successful AI implementation.

Dr. Peter Aiken
President,
DAMA International

Appendix A: About this Research

5. Appendix A: About this Research

5.1 RESEARCH METHODOLOGY

We value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community. The data shared in this report is just a small sample of the overall data generated in preparation for each research report, and the distribution of the full set of findings is limited to the underwriters.

The survey was designed by AIIM staff and members of the AIIM Board of Directors.

The survey was taken using a web-based tool from March 26, 2024, to May 13, 2024. The sampling method used is voluntary response sampling. The survey was sent to individuals on AIIM's mailing list and shared on social media. The respondents consist of those who voluntarily responded to the invitation.

The survey utilized skip logic to create a more tailored and efficient experience for respondents. Skip logic, also known as conditional branching, is a feature that changes the sequence of questions presented to a respondent based on their previous answers. This allows for a more personalized survey flow and reduces the number of irrelevant questions respondents encounter. Respondents who indicated they were not involved directly or partially in the practice of information management bypassed irrelevant questions. For clarity, responses from individuals from Suppliers of Information Management Software or Services (6% of respondents, N=28) have been excluded from the report to focus on the responses from end users. This report shares the integrated results unless otherwise stated — with specific N (number of respondents) details listed with each data chart.

The survey was sent to a mailing list of approximately 37,000 individuals, out of which 433 respondents completed the survey. The survey results have a margin of error of ±4.66% at a 95% confidence level.

5.2 USING THIS RESEARCH

As the non-profit association dedicated to nurturing, growing, and supporting the intelligent information management community, AIIM is proud to provide this research at no charge to our members and survey respondents.

In this way, the entire community can leverage the education, thought leadership, and direction provided by our work. We would like these research findings to be as widely distributed as possible.

Feel free to use individual elements of this research in presentations and publications with the attribution — © AIIM 2024, www.aiim.org. Permission is not given for other aggregators to host this report on their websites. Rather than redistribute a copy of this report to your colleagues or clients, we would prefer that you direct them to *.aiim.org/research* for a download of their own.

Appendix B: Respondent Demographics

6 Appendix B: Respondent Demographics

6.1 RESPONDENTS BY RESPONSIBILTIES

The vast majority of survey respondents, 80%, work directly in information management roles such as Information Management, Records Management, Data Governance, or Information Governance. A smaller but still significant portion of respondents, 18%, indicate that while their roles utilize information management practices, it is not their primary job function. Only a very small percentage of respondents, 2%, report that their roles do not directly involve information management practices.

Which of the following best describes your role in relation to information management practices? (Please select only one.)

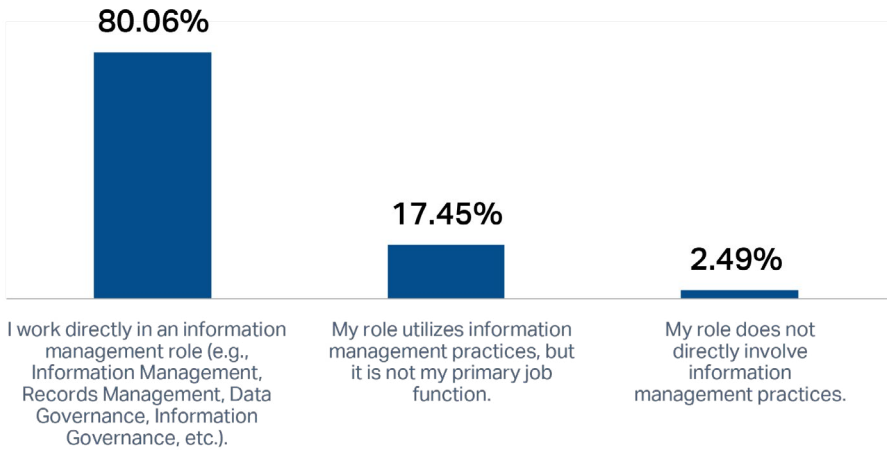


Figure 27. Number of respondents involved directly or partially in information management practices. (N=361).

6.2 RESPONDENTS BY INDUSTRY

The largest group of end user respondents, or those individuals who use and purchase information management solutions, came from Government and Public Services (24%); Banking and Finance (7%); and Education (6%).

What option best describes your organization's primary industry?

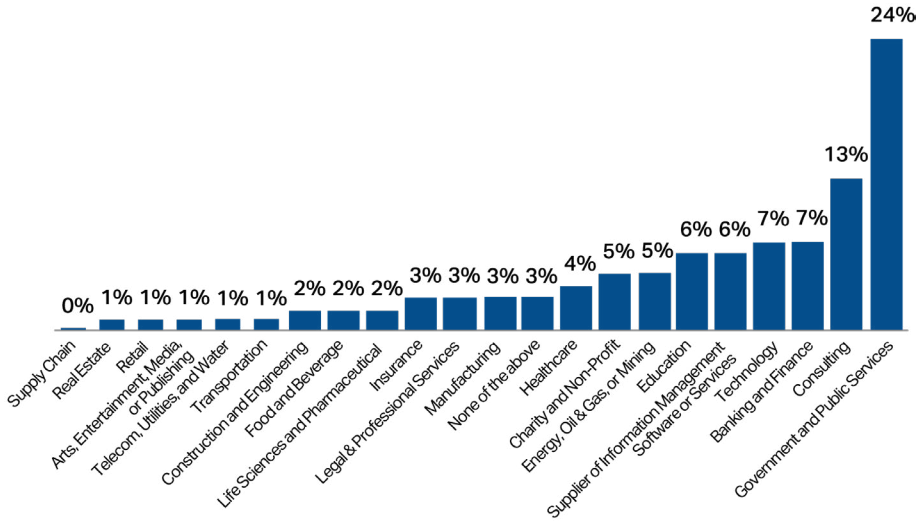


Figure 28. Respondents by Industry (N=433).

6.3 RESPONDENTS BY GEOGRAPHIC REGION

In the 2023 survey, 73% participants were from North America. This year, with support from DAMA International and Records and Information Management Practitioners Alliance (RIMPA Global), the response was significantly more diverse and better reflects the perspectives of the global information and data management industry. The majority of respondents are in North America (58%); Europe (18%); and Oceania (8%).

In which geographical region is your organization headquartered?

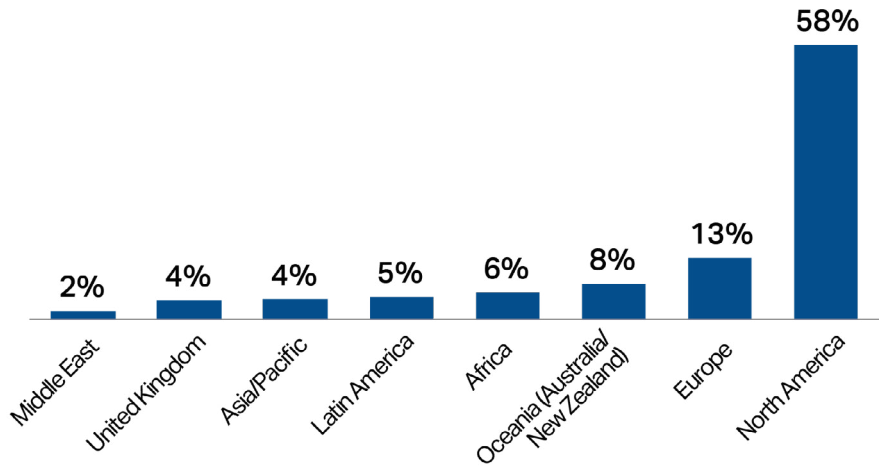


Figure 29. Respondents by Geographic Location (N=432).

6.4 RESPONDENTS BY ORGANIZATION SIZE (NUMBER OF EMPLOYEES)

To help discern differences in the level of investment in information and data management by organization size, the survey asked respondents about the number of employees within their organization. The survey respondents represented organizations of various sizes, as measured by the number of employees. The largest proportion of respondents (29%) belonged to organizations with 1,001 to 10,000 employees, closely followed by those with 101 to 1,000 employees (24%) and those with over 10,000 employees (24%). Smaller organizations were also represented, with 13% of respondents from organizations having 11 to 100 employees and 10% from organizations with 1 to 10 employees. This diverse representation ensures that the survey results reflect the perspectives of organizations across a wide range of employee counts.

Approximately how many total employees work at your organization across all locations and branches?

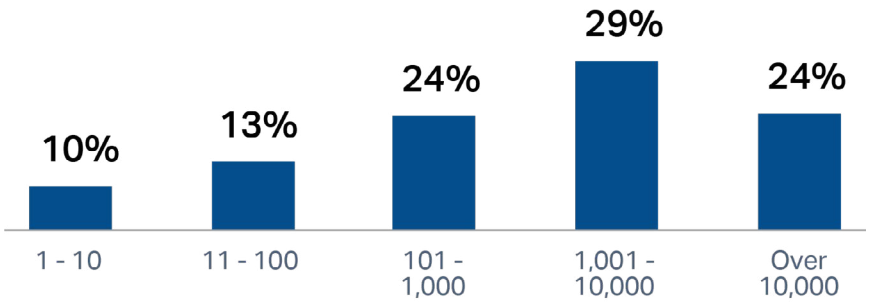


Figure 30. Respondents by Organization Size (N=431).

6.5 RESPONDENTS BY ORGANIZATION SIZE (ANNUAL REVENUE)

This year, survey respondents were also asked to share their organization's total revenue to determine if there is correlation between annual revenue and the level of maturity of information and data management programs.

The survey respondents represented organizations across a wide range of annual revenue levels. The majority (29%) reported revenues below $10 million, followed by 17% with revenues exceeding $5 billion. The remaining respondents were distributed relatively evenly among the other revenue categories, ranging from $10 million to $5 billion. This diverse representation enables a comprehensive analysis of the survey results, considering the perspectives of organizations with varying financial scales.

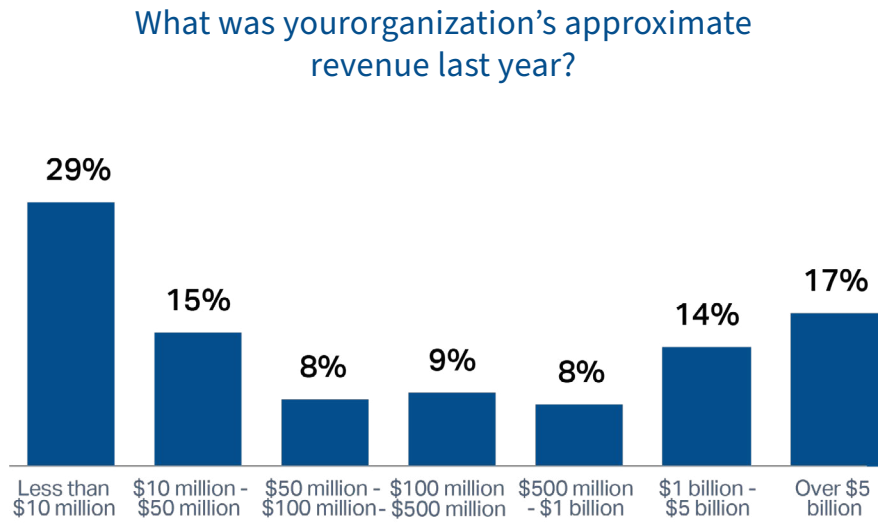


Figure 31. Respondents by Organizational Annual Revenue (N=399).

6.6 RESPONDENTS BY DEPARTMENT

The survey respondents represented various departments within their organizations, with a significant majority (52%) working in Information Management, Records Management, or Information Governance roles. The second most represented department was IT, Engineering, or Product Development, with 16% of respondents. Executive and Administrative roles accounted for 7% of respondents, while Legal and Sales/Business Development departments represented 5% and 4%, respectively.

Other departments, such as Marketing/Communications, Operations/Supply Chain, Customer Service/Support, HR/Administration, and Finance/Accounting, each had a small proportion of respondents, ranging from 1% to 2%. Additionally, 9% of respondents selected the "Other" category, indicating that they work in departments not specifically listed in the survey options.

These results suggest that the survey primarily captured insights from professionals working in information management and related fields, with representation from a diverse range of other departments as well.

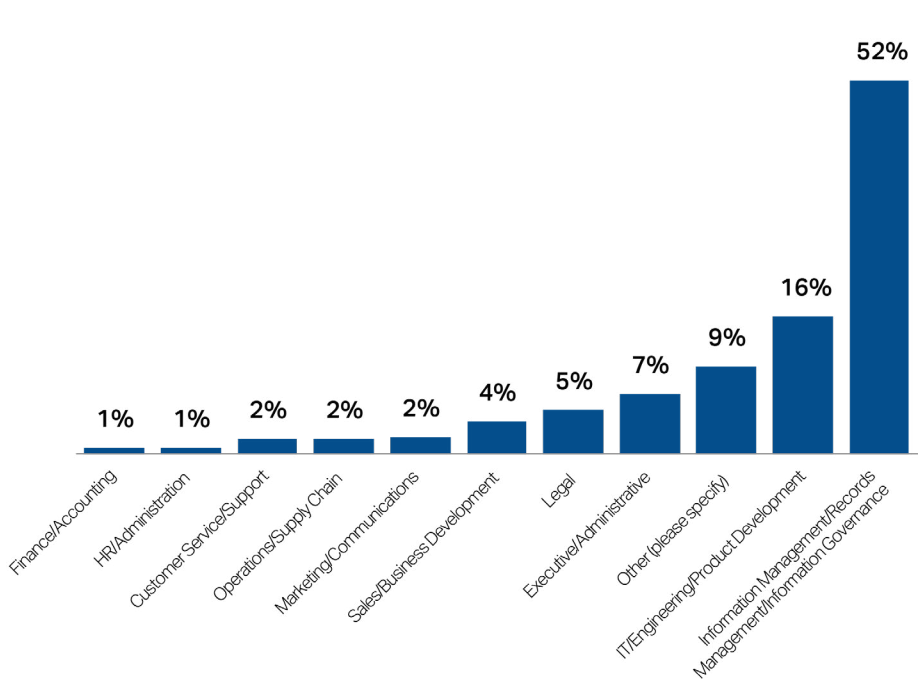


Figure 32. Respondents by Department (N=383).

6.7 DIVERSITY OF RESPONDENTS

This survey aimed to assess the state of the practice and as part of that aimed to collect data on the diversity of respondents to establish benchmarks for improving diversity in the industry.

6.7.1 - RACE AND ETHNICITY

The survey gathered demographic information regarding respondents' ethnicity. The majority of respondents (63.48%) identified as White/Caucasian, followed by those who preferred not to answer (12.64%). Black or African American respondents accounted for 7.58%, while Asian/Pacific Islander and Hispanic respondents represented 6.74% and 5.06%, respectively. A small percentage of respondents (3.93%) identified as having multiple ethnicities or belonging to other ethnic groups not specifically listed. American Indian or Alaskan Native respondents constituted 0.56% of the sample.

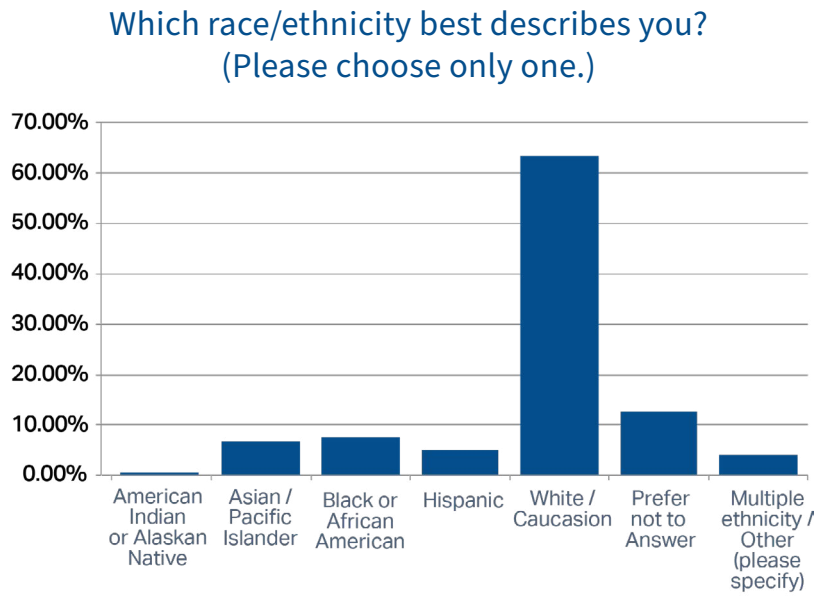


Figure 33. Respondent Race/Ethnicity (N=356).

6.7.2 - GENDER IDENTITY

The survey also collected demographic information on respondents' gender identity. The respondents were nearly evenly split between females (45.66%) and males (45.94%). A small percentage of respondents (7.84%) preferred not to disclose their gender, while 0.56% of respondents identified with a gender not specifically listed, opting to specify their gender identity separately.

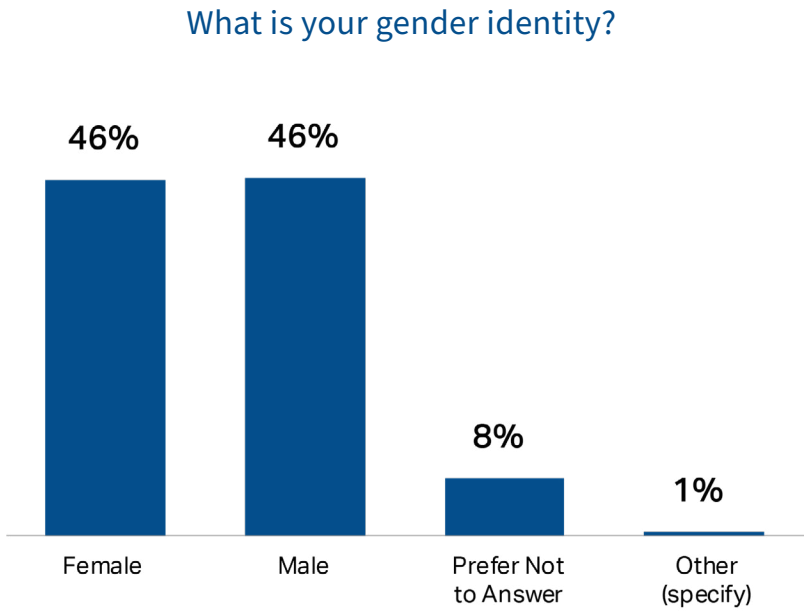


Figure 34. Respondent Gender Identity (N=357).

6.7.3 - AGE RANGE

The survey gathered age demographic data from respondents, revealing that the majority of participants were in the older age brackets. The largest age group represented was 45-54 years old, accounting for 30.90% of respondents, followed closely by the 55-64 age group at 28.93%. The 35-44 age group comprised 19.38% of respondents, while those 65 years or older made up 9.27%. The younger age groups had lower representation, with 3.93% of respondents in the 25-34 age range and only 0.56% in the 18-24 category. Notably, 7.02% of respondents preferred not to disclose their age.

Compared to the previous year's survey, the age distribution remained consistent, with most respondents being over 30 years old. Last year, the 45-60 age group accounted for 44% of respondents, while the 30-44 age group represented 42%.

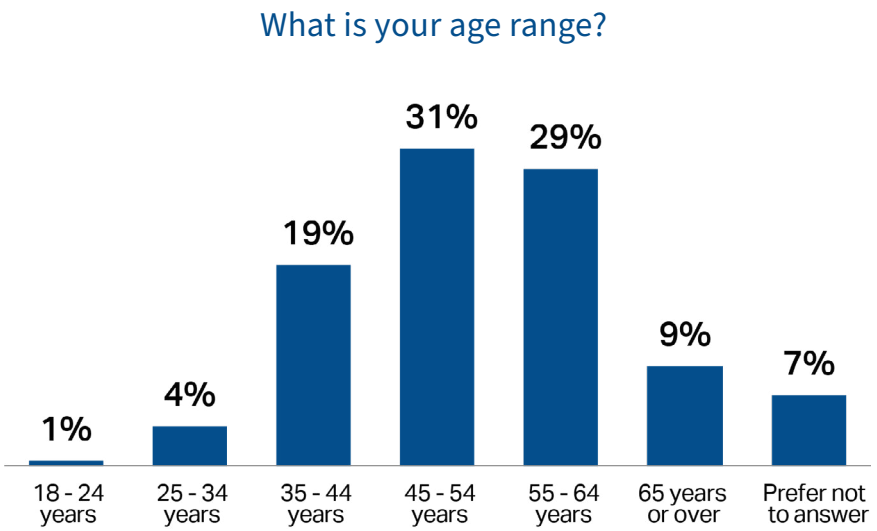


Figure 35. Respondent Age Range (N=356).

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