



# What will it take to be a NextGen InfoPro?

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## About the White Paper

As the non-profit association dedicated to nurturing, growing and supporting the user and supplier communities of ECM (Enterprise Content Management) and Social Business Systems, AIIM is proud to provide this research at no charge. In this way the entire community can take full advantage of the education, thought-leadership and direction provided by our work. Our objective is to present the “wisdom of the crowds” based on our 80,000-strong community.

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## Process used and survey demographics

The survey results quoted in this report are taken from a survey carried out in May of 2015, with 264 responses from individual members of the AIIM community surveyed using a web-based tool. Invitations to take the survey were sent via email to a selection of AIIM's 80,000 registered individuals. 61% of the respondents are from North America and 21% from Europe, covering a representative spread of various industry sectors.

## About AIIM

AIIM has been an advocate and supporter of information professionals for nearly 70 years. The association mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and big data. AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community: practitioners, technology suppliers, integrators and consultants. AIIM runs a series of training programs, which can be found at <http://www.aiim.org/Training>.

## About the author

Bob Larrivee is Director of Custom Research at AIIM, and an internationally recognized subject matter expert and thought leader with over thirty years of experience in the fields of information and process management. Bob is an avid techie with a focus on process improvement, and the application of advanced technologies to enhance and automate business operations.

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## Introduction

The information management landscape is changing at an exponential rate, putting new demands on how we are required to manage all of our information across the enterprise, and beyond. This includes information placed out on social media channels, stored in the Cloud, the capture and access of information by a mobile workforce, and an array of new technologies invading the workplace through corporate control or Bring-Your-Own-Device (BYOD) approaches.

NextGen InfoPros must be aware of and anticipate these changes along with the impact they will have across the organization. Gone are the days of reactive information management. From today forward, information professionals must become proactive in managing information, leveraging technology, participating in security and privacy activities, improving operational efficiencies, and extracting greater benefit from corporate and external information stores using data analytics. Not only must information be kept in ways that meet compliance and security requirements, it must also be made available in ways that it can be re-purposed and shared with others for the benefit of the entire organization.

In the same way that interventional medicine is able to address a situation before it becomes a serious issue, so too must the NextGen InfoPro be prepared to address potential issues and work to intervene any negative outcome. This requires a specialized set of operational skills alongside acquired knowledge of the current and evolving technology sets.

In this report, we look at the expectations organizations have of their information professionals over the next three to five years, how respondents see themselves in relation to these growing expectations, and the steps they can take to gain the requisite skill sets to remain relevant.

## Key Findings

- **Looking out over the next 3 – 5 years, risk, security and data privacy top the list of desired skills for 50% of organizations.** Not far behind are content and records management at 47% and analytics of data, content, and metadata at 44%.
- **The most sought after capabilities focus on accessibility (53%) that includes use of mobile devices.** Data quality management, data cleansing, and migration are next (49%) followed by information security and access control (42%).
- **From a project standpoint, content and records management is the focus for 40% of organizations over the next 3 – 5 years.** 39% of respondents cite business process management (BPM) and 31% see information and capture as their main focus, indicating the desire to address end-to-end operational goals.
- **52% of respondents say that skills related to the translation of business requirements into the more tactical side of implementation will have the greatest impact on their content management projects over the next 3 – 5 years.** 46% see compliance skills as having the greatest project impact and 45% will seek talent to assign value to information and data.
- **32% of our respondents see taxonomy and metadata design – providing structure to their information sets - as the greatest technical skill set for their organizations.** In equal stature, information security and process analysis fall into second place at 30% each, while 29% cite application and process integration as the greater demand for their organizations.
- **The demand for technical knowledge focuses on information security systems and procedures for 68% of respondents, acknowledging that technology alone will not suffice when it comes to protecting corporate information assets.** 60% cite Enterprise Content Management (ECM), Document Management (DM), and Records Management (RM) systems knowledge as key while 53% are concerned with use of mobile devices.
- **Organizational expectations are much broader and include soft skills like innovative thinking (70%).** Along with this, change management (70%) and relationship management that encompass internal and external parties are now part of an expected skill set provided by information professionals.
- **When it comes to skills improvement, 79% of respondents see themselves as taking a proactive position, with just 8% happy as they are.** For the most part, our respondents have the desire and drive to enhance their skills rather than wait for someone or something to come along and be presented to them.
- **When rating their skill levels from a technical perspective, many feel they are “very to extremely strong” in content and records management (71%), and BPM (56%).** The weakest areas for our respondents, and greatest areas for professional enrichment, are in predictive analytics (8%) and social and mobile integration (12%).

- **The method of choice for professional development is through online learning programs (52%), supporting the flexibility aspect of self-learning and course engagement.** Professional conferences are the venue of choice for 45% of respondents, serving as a combined forum providing educational sessions, supplier interaction, and peer-to-peer networking opportunities.
- **It is encouraging to see that 53% of organizations are very active (25%) or somewhat active (28%) when it comes to support for professional growth.** The indication being that organizations recognize the value of their employee base and the benefit to be gained from the investment made in their professional development. Only 4% say they receive no support at all.
- **Fifty percent of our respondents feel their organizations should proactively seek and identify SMEs who would then be positioned as mentors.** 49% say the organization should seek out more specialized training with 42% indicating that greater participation at the project level would meet their growing professional development needs.

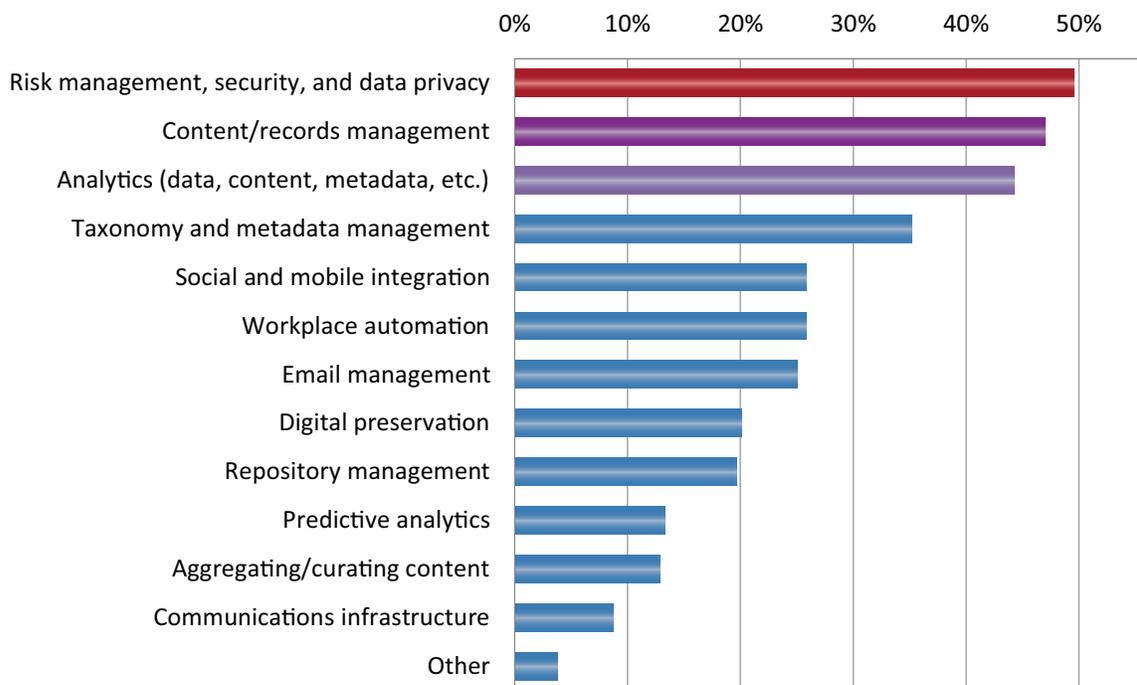
## Future Needs

The NextGen InfoPro will be recognized and accepted as an information and data lifecycle subject matter expert (SME). Traditional skills, such as policy development, oversight of retention and defensible disposition programs, and compliance monitoring must be joined by knowledge in related information technology fields, change management, and process management. NextGen information professionals must be in a constant state of educating themselves and their constituents on the latest technology developments and how they impact their organization. They must be prepared to leverage their subject matter expertise, and present their opinions about technology, data analytics, metadata management, security, privacy and more, to senior management, business managers, and project teams.

A mixture of learning modes must be taken advantage of in order to achieve a higher level of credibility and longevity within an organization. These include but are not limited to formal education programs, conducting research on various topics, attending webinars and professional events, and engaging in vendor or supplier training programs.

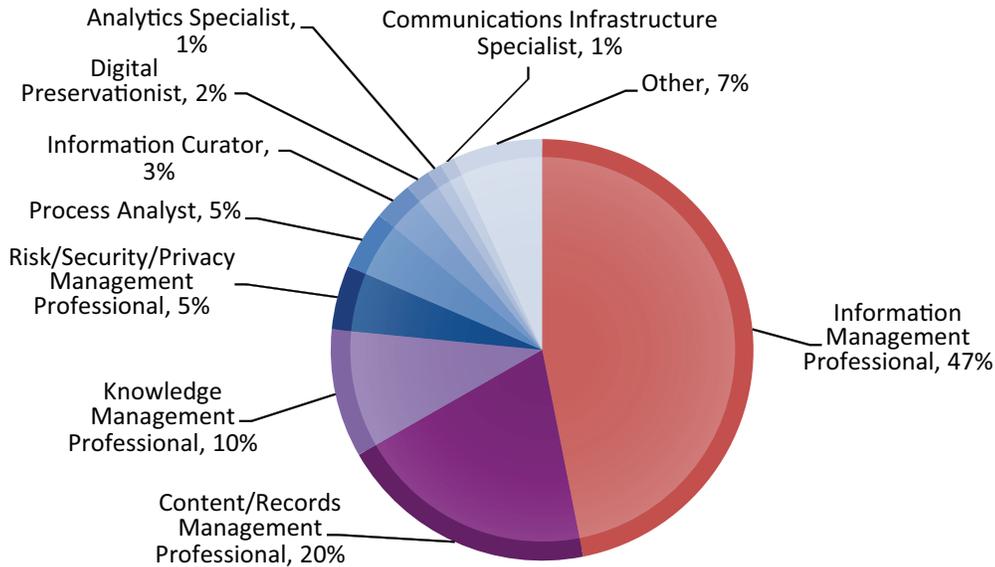
Looking out over the next 3 – 5 years 50% of responding organizations see skills in risk management, security, and data privacy as being the most desired or valued. This strongly reflects the recent increase and significant impact of data breaches and leaked content on corporate brands and governments. For 47% of respondents, content and records management skills remain the most desired, while 44% see analytics of data, content, metadata and more, as a critical talent expected from their information professionals. (Figure 1)

**Figure 1: Over the next 3-5 years, what do you see as the most desired/valued information management skill sets for your organization? (N=246)**



When asked about future roles, 44% of our respondents see themselves evolving into the broader role of “information management professional.” Significantly less will remain content and records management professionals (20%), while only 10% have set a goal of becoming knowledge management professionals. In each of these cases, familiarity with many information management and governance practices and technology capabilities is required to be proficient. (Figure 2)

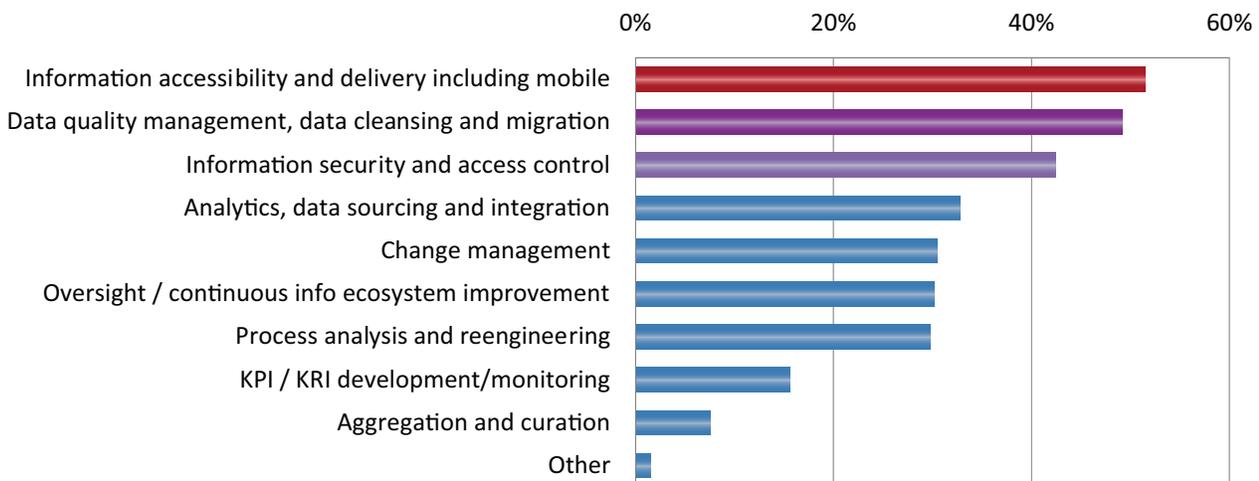
**Figure 2: Over the next 3-5 years, what do you see as the principal role you will play in your organization? (N=264)**



While security and risk top the list of desired skill sets for information management professionals as shown in Figure 1, the greatest capabilities desired by organizations focus on information accessibility and delivery which includes use of mobile devices (53%), acknowledging the growing trend of mobile device use and acceptance of BYOD (bring your own device). While this appears to be an anomaly, it can be explained in that skills are learned and when applied, become a capability to make things happen.

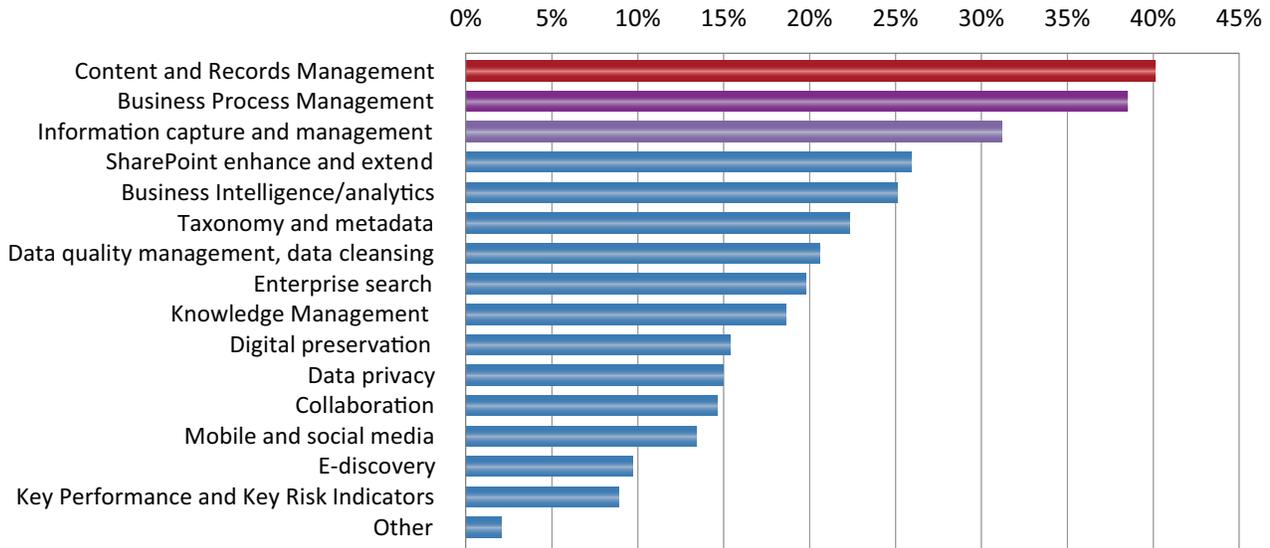
Data quality management, data cleansing, and migration follow at 49%, aligning with organizational goals of increased findability and usability of valuable business information. Rounding out the top three is information security and access control at 42%, signaling the increased awareness and movement in securing corporate information assets while providing controlled, authorized access to these resources. This also aligns with the desired skill sets related to security and risk discussed earlier. (Figure 3)

**Figure 3: Which of the following capabilities do you believe will be in the greatest demand from your organization's information management professionals? (N=262)**



Turning our attention to upcoming or planned projects, content and records management continues to be the focus for 40% of organizations over the next 3 – 5 years. Interestingly, 39% of respondents cite BPM and 31% information and capture as their focus. This indicates the desire to address end-to-end content-related processes, beyond just records, that meet and support operational objectives and goals. This also indicates a growing awareness that the increasing generation of data and information is becoming more complex and difficult for individuals to manage. Future information management practices will require intelligence to be built into workflows and automated tagging tools to manage risk, cost, and value. (Figure 4)

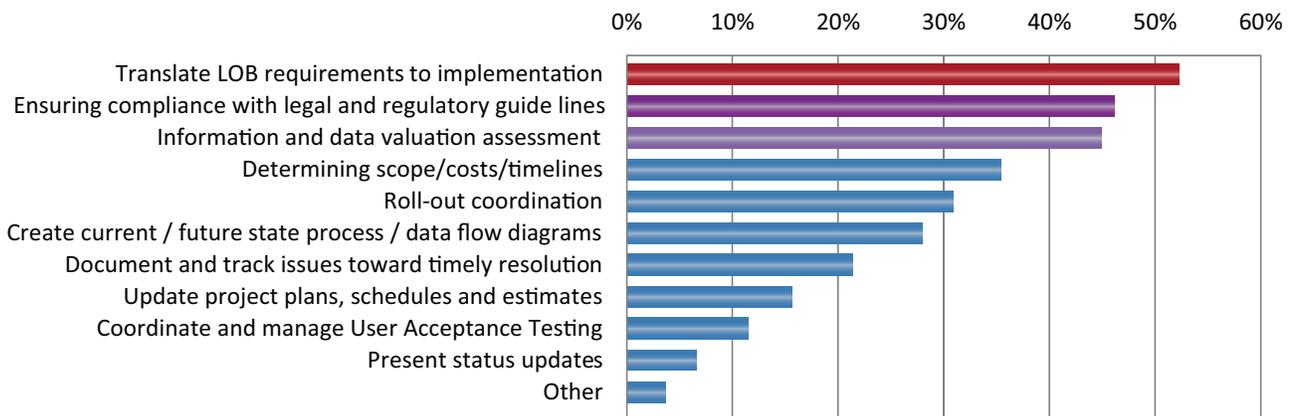
**Figure 4: Which of the following projects do you feel will be in the greatest demand for your organization over the next 3 – 5 years? (N=247)**



When asked about perceived project management skills needed to successfully complete projects from beginning to end, the ability to translate business requirements into practical implementation tops the list for 52% of our respondents. This is an indication that project success begins by aligning functional and technical requirements with the identified business requirements to resolve business problems. It is at this convergence where the information professional should be positioned in support of these activities.

For 46% of respondents, being able to ensure legal and regulatory compliance has the greatest project impact. Forty-five percent indicate that knowledge related to the identification and assignment of value to information and data has the greatest impact on content management projects, as it will facilitate data analytics, search, and access. Both of these support the concept of business value in information that is securely managed in support of required compliance standards, rules, and regulations. (Figure 5)

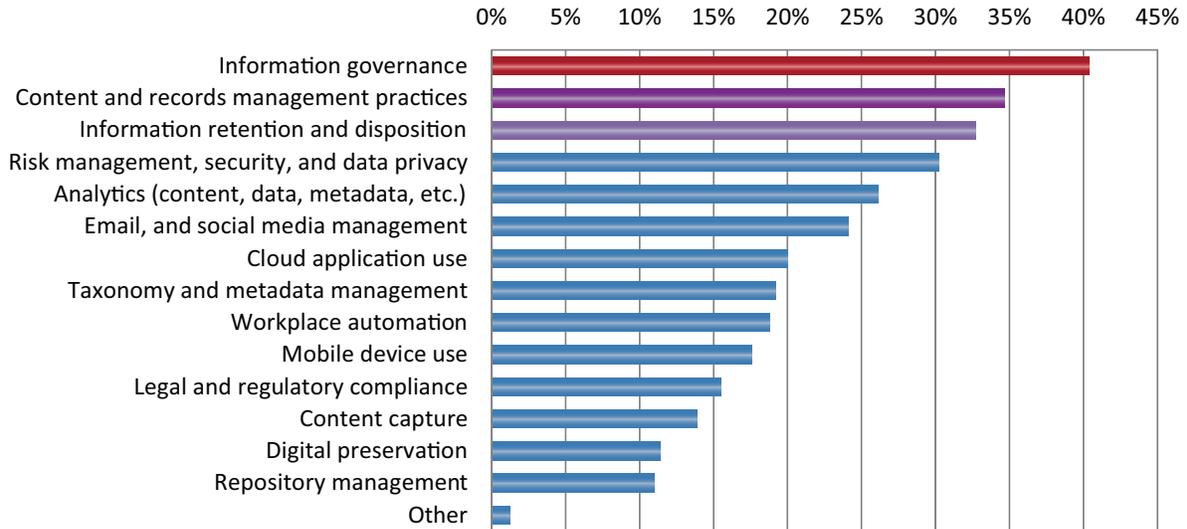
**Figure 5: Which of the following project management skills do you believe will have the greatest impact on your content management projects over the next 24 months? (N=243)**



Realization has set in for 40% of organizations, that there is a need for improved information governance, content and records management practices (35%), and retention and disposition practices (33%). Again this reflects a greater awareness of the need for lifecycle management of all data and content, not just records. This

requires collaboration across and between many business functions to ensure a sustainable information strategy is developed, implemented and maintained. As a result, we see a rise in the need for individuals to be held responsible and accountable for information governance, perhaps taking the form of an Information Governance officer or manager. The reference to practices infers that organizations are looking beyond technology, to include people and processes as part of their overall information strategy. (Figure 6)

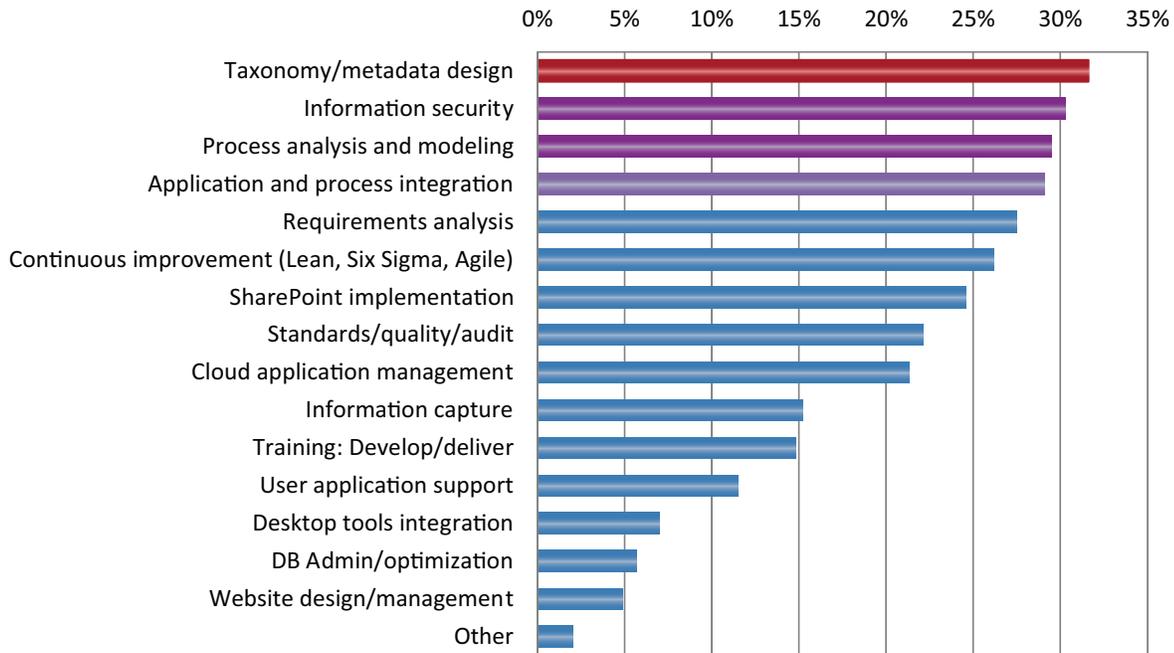
**Figure 6: In your opinion, which of the following do you feel your organization realizes are areas for improvement? (N=245)**



While there are those who feel that the need for a formal information management structure is fading, 32% of our respondents see taxonomy and metadata design that provides structure to their information sets as the greatest technical skill required for their organizations.

Information security and process analysis fall into a close second place at 30% each, while 29% cite application and process integration as the greater demand for their organizations which strengthens the premise that the greatest value from information is gained through organization, control, and integration throughout the organization and across operational processes. (Figure 7)

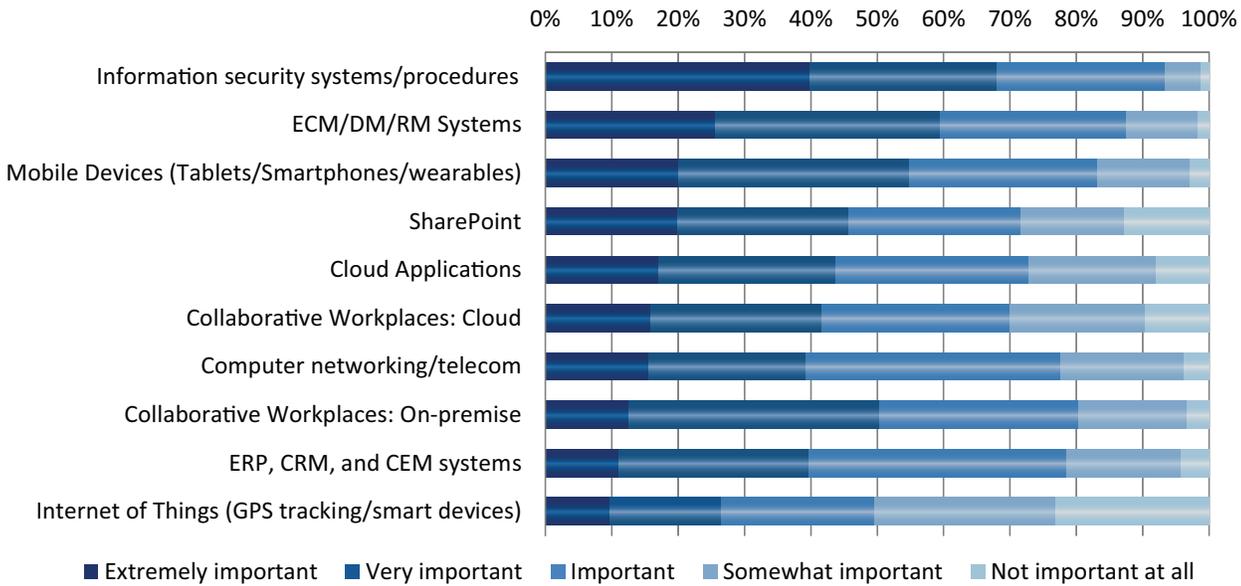
**Figure 7: Which of the following technical skill sets do you believe will be in the greatest demand for your organization's information management professionals? (N=244)**



Expectations are high regarding the level and importance of technical knowledge an information management professional brings to an organization. Information security systems and procedures top the list for 68% of organizations which acknowledges that technology alone will not suffice when it comes to securing and protecting corporate information assets.

60% cite ECM/DM, and RM systems knowledge as key while 53% are looking at mobile devices use. The latter supports the recent rise of the Chief Mobility Officer (CMoO) in some larger organizations. (Figure 8)

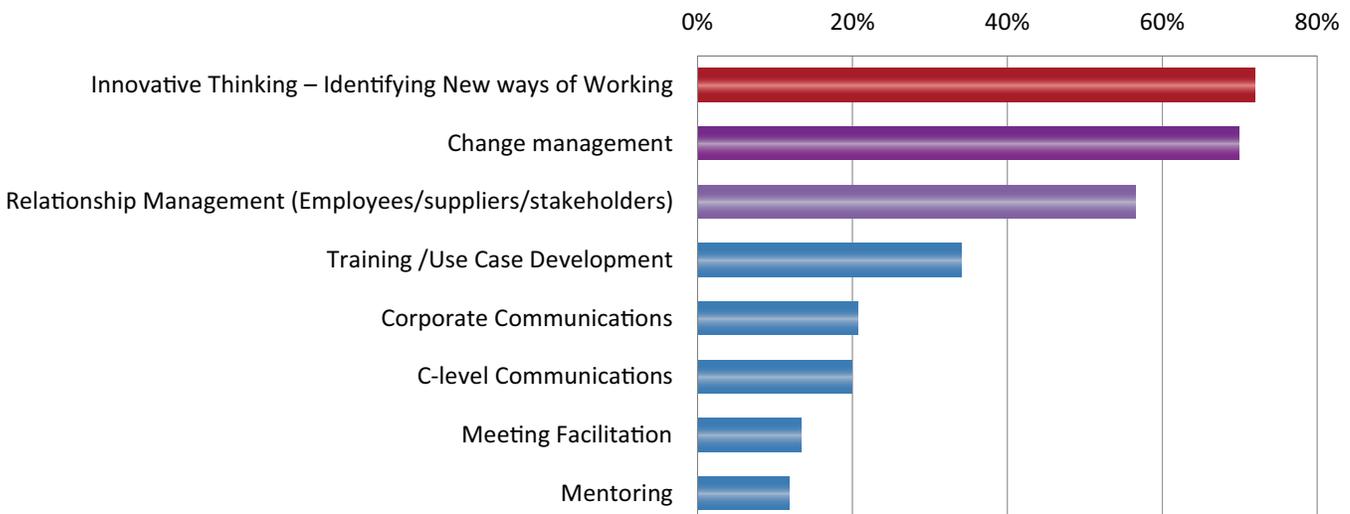
**Figure 8: What level of knowledge of the following information technology platforms do you feel are of greatest demand for your organization? (N=244)**



As earlier findings in our research have indicated, technical skills alone are not the only requirement placed upon the information professional. Organizational expectations have broadened to include soft skills such as innovative thinking (70%), change management (70%), and relationship management that encompass both internal and external parties.

These are now expected skill sets for information professionals due largely to the need for cross-functional teaming and facilitation of various projects and enterprise or global level information management programs. (Figure 9)

**Figure 9: Which of the following soft skills do you believe will be in the greatest demand for information management professionals in your organization? (N=246)**



## Personal Perspectives

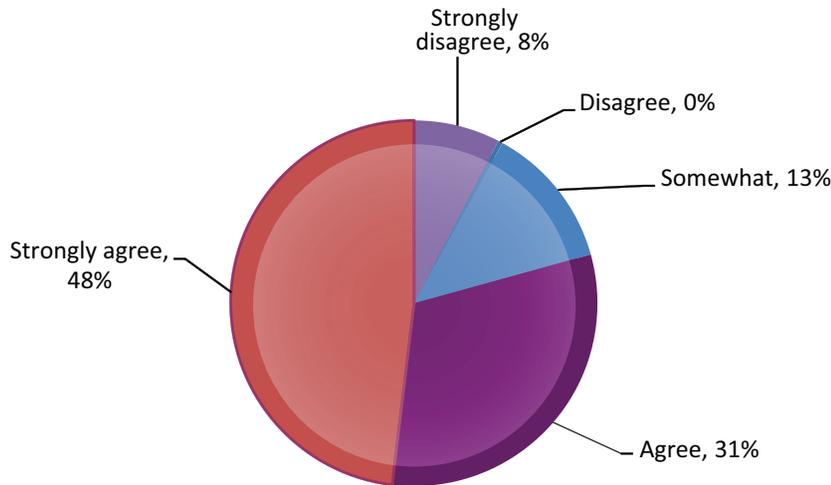
With organizational perceptions of the future identified for the information professional, we now turn our attention to the individual for their assessment of where they fit into the equation. We look at their perceived capabilities and strengths, and identify areas of improvement necessary to meet future demands.

Not surprisingly, respondents indicate strengths in content and records management, BPM, taxonomies, and other areas in which they have been involved for years. It is also of little surprise that these individuals indicate a lack of comfort in the areas of data analytics, security, risk, privacy, and social/mobile usage - all areas that organizations have expressed their skill set expectations for the future.

When asked about the role they play in proactive participation in the search for additional professional skills training, 79% say they are proactive while 8% assert strongly that they are not.

For the most part, our respondents have the desire and drive to enhance their skills rather than wait for someone or something to come along and be presented to them. They are taking control of their careers, seeking opportunities and ways to enhance their skills (Figure 10).

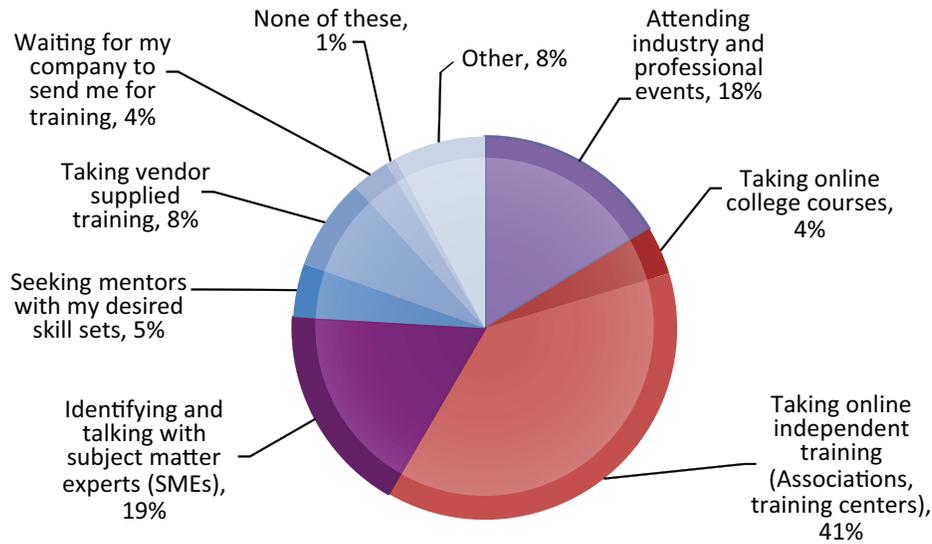
**Figure 10: How do you feel about the following statement: "I am proactive in seeking additional training and education to enhance my professional skills." (N=237)**



Turning our attention to professional enrichment, 45% of respondents indicate they take online training courses: 4% from academic institutions and 41% from independent sources that include associations and private training firms.

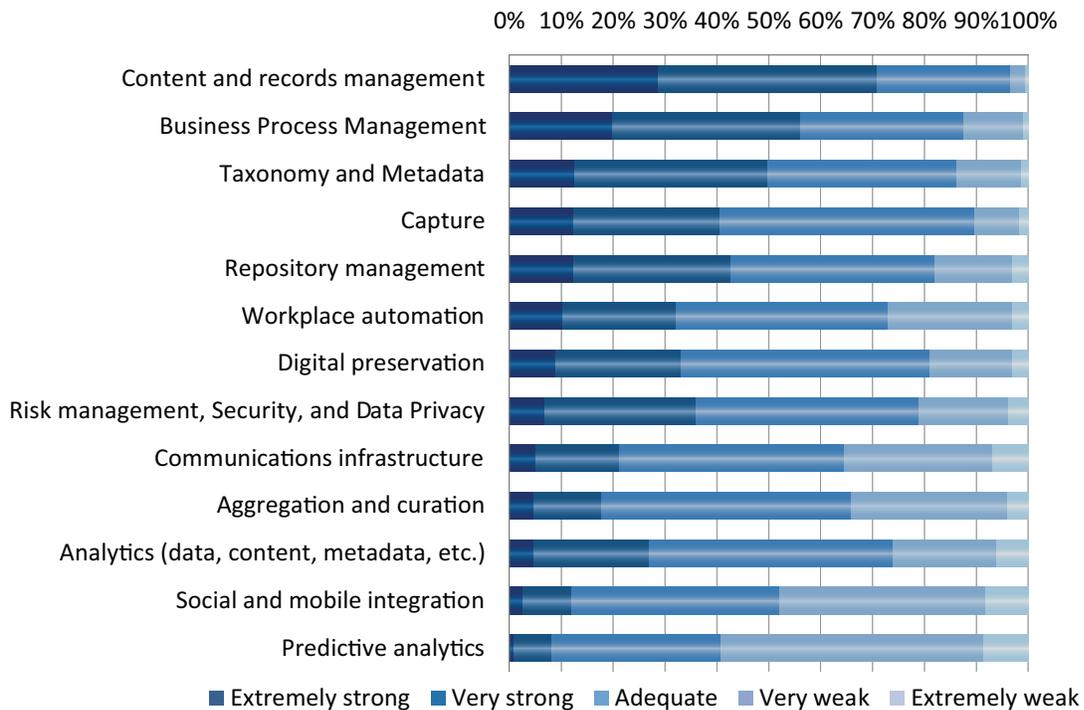
A far smaller amount (19%) seek out subject matter experts for advice and mentoring, while 18% use industry and professional events as their source of learning. The latter percentage may be low because of lack of budget to attend such programs even though they are seen as valuable venues for networking with peers and subject matter experts. (Figure 11)

**Figure 11. Which is the most important step you are currently taking with regard to your professional development? (N=228)**



Rating their skill levels from a technical perspective, many believe they are “very to extremely strong” in content and records management (71%), and BPM (56%). The weakest areas for our respondents, and greatest areas for professional enrichment, are in predictive analytics at 8%, (the weakest point within the realm of analytics for many organizations) and social and mobile integration (12%) which has been identified as a growing concern and requirement for many organizations. In between the strengths and the weaknesses in skills lie analytics, digital preservation, and security and privacy all of which are integral to managing and leveraging an organization’s information. The message for the NextGen InfoPro is to enhance their skills in these job-affirming areas. (Figure 12)

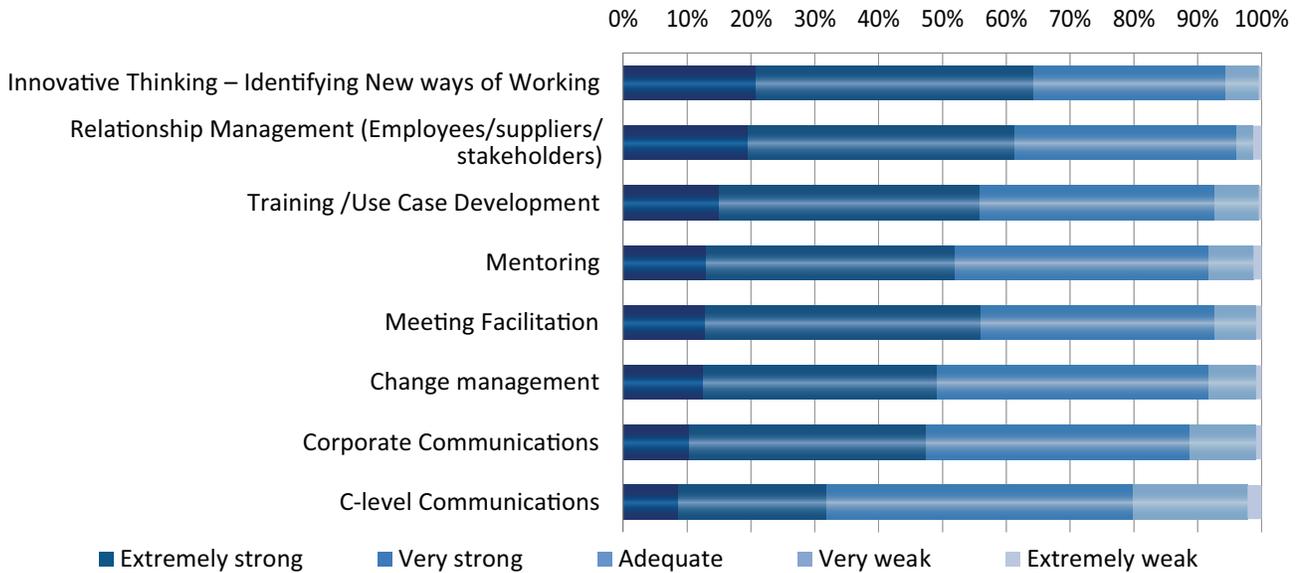
**Figure 12: How would you rate your technical skills in the following areas? (N=235)**



In relation to the soft skills expectation organizations are placing on their information professionals, innovative thinking (64%) and relationship management (61%) are viewed as areas of strength for the majority of respondents. In particular, relationship management has become a crucial skill for information professionals who serve as the facilitator between many disparate business functions that include operational business units, legal and discovery, IT, compliance, risk, data scientists, vendor management, and more.

The weakest area, and opportunity for professional improvement cited, is C-level communication (32%) which is not surprising in that many people have little occasion to present to “higher-ups” and may be uncomfortable doing so. Corporate communications (47%) also scores low perhaps due to little practice in crafting “official messages”. This can be overcome by leveraging relationships with Corporate Communications or a similar subject matter expert function or seeking help from external sources to augment these skills. (Figure 13)

**Figure 13: How would you rate your soft skills in the following areas? (N=234)**



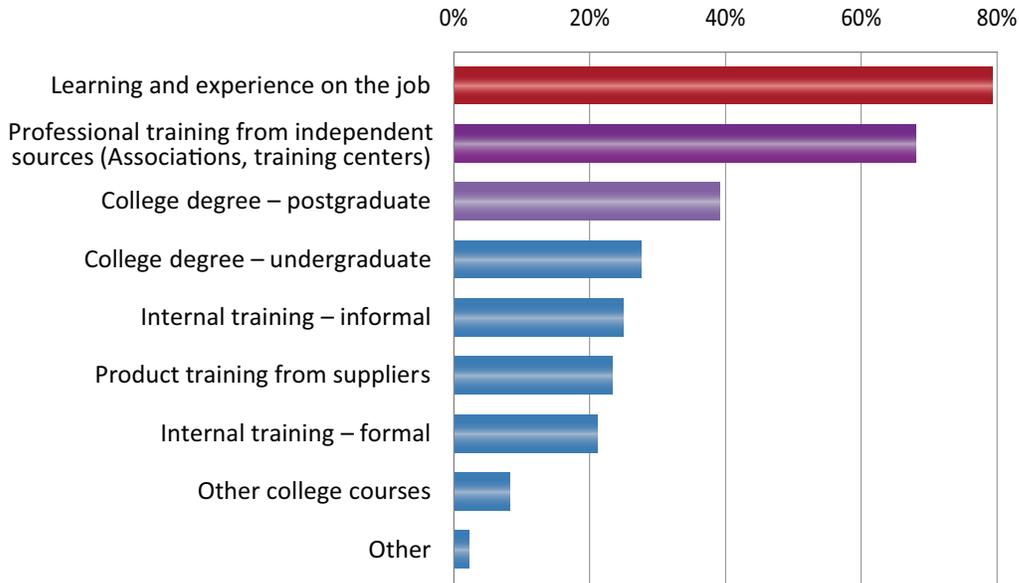
## Personal Actions

For the most part, many of our respondents are actively seeking new knowledge and ways to enhance their skills in order to remain relevant. When we look at how respondents acquire new skills and expand their knowledge, we find that internal training falls short as only 20% cite access to formal internal training.

For 79% of the respondents, on-the-job learning and on-the-job experience make up the bulk of how knowledge and expertise are gained. There may be some mentoring taking place as indicated by 25% who report that they receive informal internal training, although this could just be operational requirements being passed from one individual to another.

The majority of respondents (68%) cite professional training from independent sources as their means to raise their level of expertise, while fewer partake in post-graduate, academic programs (39%). Those who do indicate participation in post-graduate programs feel that while their institutional studies were adequate, there are gaps in those programs that need to be filled in order to address the realities of post-academic, non-theoretical practice in business. (Figure 14)

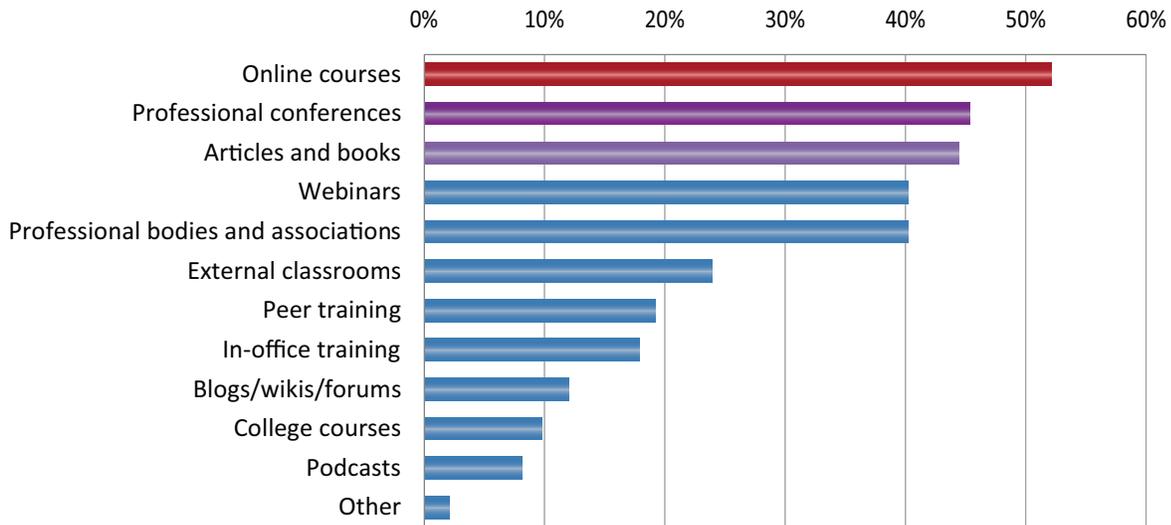
**Figure 14: How did you acquire your current level of expertise? (N=232)**



The method of choice for professional development is online learning programs that enable the flexibility of self-learning and course engagement from any place, at any time, with little to no restriction. Professional conferences are the venue of choice for 45% of respondents, serving as a combined forum providing educational sessions, supplier interaction, and peer-to-peer networking opportunities.

Surprisingly, 44% say they prefer articles and books as their learning method of choice, indicating an effort to gain knowledge and insight in a more targeted manner, likely on a specific topic rather than a broader view. In this case, articles and books would include electronic media like blogs, online magazines, and e-books. (Figure 15)

**Figure 15: What are your preferred methods of professional development? (N=234)**



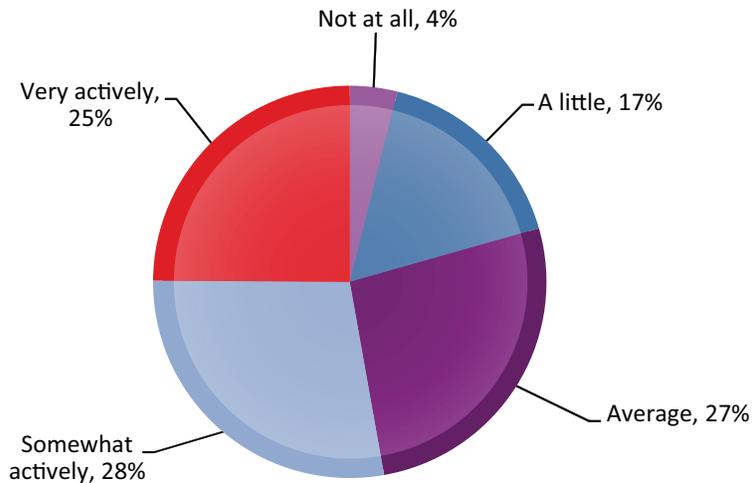
## Organizational Support

NextGen InfoPros must advocate for themselves and remain proactive in seeking to enhance their professional knowledge and skills. That said, there is benefit to be gained by and in the best interest of the organization to invest in its human resources, supporting the growth of their information professionals through education and training, in order to satisfy required skills and capabilities.

Given that information professionals with the appropriate skill set are in demand, and that there is a vested interest in retaining the experience and knowledge of current and long-term employees, it is encouraging that

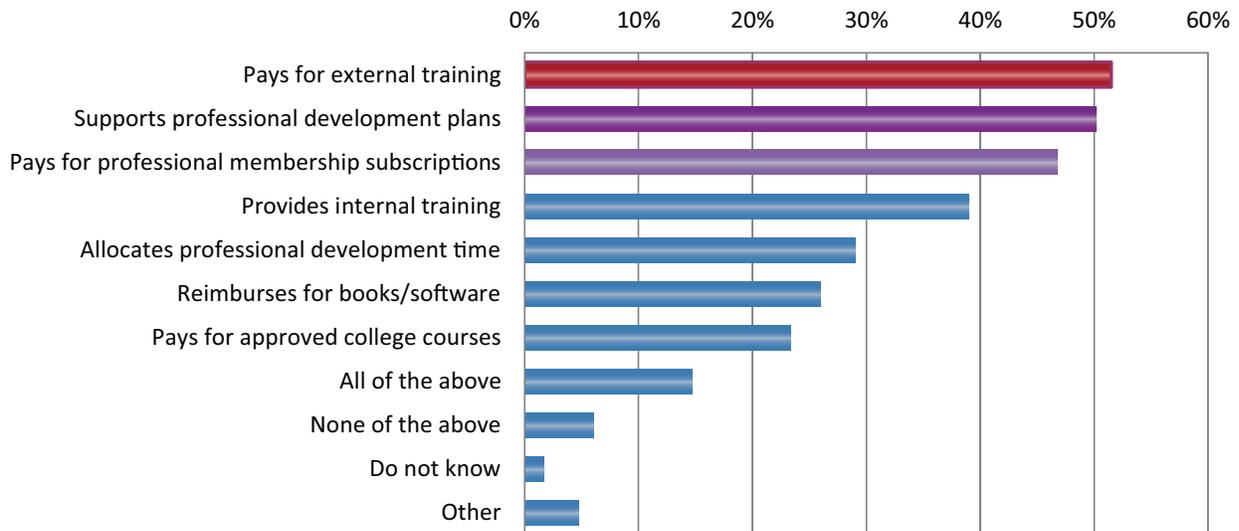
53% of respondents say their organization is very active (25%) or somewhat active (28%) when it comes to supporting their professional growth. This is an indication that organizations recognize the value of their employee base and the benefits to be gained from investing in their professional development. Fortunately for the information profession, a mere 4% say they see no support at all. (Figure 16)

**Figure 16. In overall terms, how well would you say your organization supports your professional growth? (N=233)**



Organizational support for professional development manifests itself in a number of ways. For 52% of our respondents, it is by paid external training. For 50% of organizations, there is support for professional development plans. Closely following is professional memberships which are funded by 47% of organizations. The number of respondents indicating a lack of financial support for professional development by their organization is both discouraging and disappointing. This may be an indicator of senior leadership’s continued lack of knowledge and support for the information management function, beyond technology, within their organizations. (Figure 17)

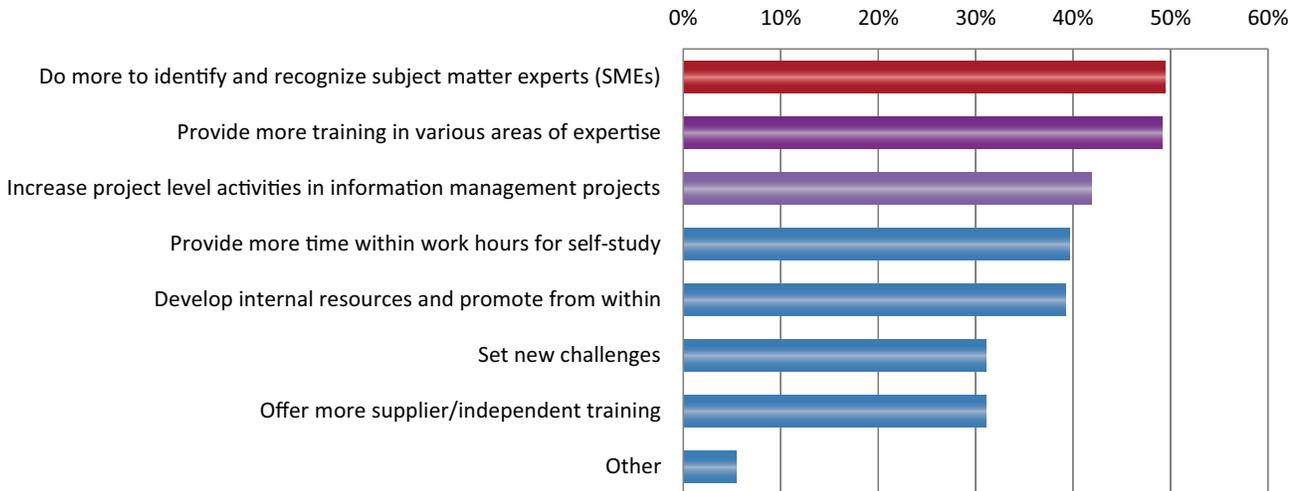
**Figure 17: In which of the following ways does your organization support your professional growth? (N=231)**



Monetary support alone is not enough to fully support the information professional's skills development. Organizations must proactively seek out and identify SMEs (Subject Matter Experts) within their walls according to 50% of our respondents. This is a growing trend in many organizations, like those in the aerospace or insurance industry, now faced with an aging workforce, preparing to retire, and taking with them the experience and knowledge the NextGen InfoPro could find of great benefit.

Nearly half of the respondents (49%) would like to receive more specialized training and 42% indicate that greater participation in enterprise projects would satisfy their desire for both more knowledge and recognition (Figure 18).

**Figure 18: Which of the following do you feel your organization could do to motivate and support professional development? (N=222)**



## Conclusion and Recommendations

NextGen InfoPros must expand their capabilities, vision, and knowledge to become recognized subject matter experts within their organizations and in the information management industry. People, process, technology, and governance are all areas that the information professional must be able to address, direct, and drive. This requires constant updating of skills and knowledge in order to anticipate and embrace change in an ever-evolving information management environment.

Indications are that business leaders do not fully understand the true and complete role of information management, focusing primarily on technology. Likewise, records and information managers face similar challenges in understanding the business needs of the organization and what is expected of them in relation to meeting and supporting those requirements.

In general, records and information professionals feel confident in their ability to help business units, and the overall enterprise, not only minimize risk and cost but also to maximize the value of their information. This suggests a lack of understanding and poor communication between the information and business units, rather than an inability to deliver.

Business leaders need to better understand what records and information managers can contribute while at the same time information professionals need to align more closely with business needs. As an example, governance and security are two of the more dominant challenges in organizations because employees can easily and unknowingly expose confidential information to unauthorized parties or inadvertently destroy it in times of legal hold and litigation. Even something as small as removing the ability to print or copy digital content, could prevent information leakage, emphasizing the need to understand business requirements and aligning information management governance and practices to support those requirements. This is where the skilled information professional evaluates, assesses, recommends, and should be involved in the implementation of the right options.

Mobile devices, cloud, analytics, wearable devices, and many more changes in the technological landscape present an ever-growing array of challenges for an organization. Mobility is now essential to many roles, and the NextGen InfoPro must include this as part of the overall enterprise strategy. In addition, they must participate in the change management process involved in bringing compliant mobile technology to the workforce as well as participating in writing policy for acceptable use. Lastly, the ability to capture, access and share information between internal and external customers is becoming mandatory rather than a “nice to have” option. When combined with cloud applications, the workforce becomes content-enabled, making them more efficient and effective in their activities. This too requires careful planning in order to align with business needs, to ensure adequate protection of confidential information, and to enable employee awareness and adoption.

## Recommendations

As the NextGen InfoPro, you must learn about and formulate your views on various information management and governance topics like data analytics and how your organization must balance risk-related requirements with the broader usage of data for competitive advantage. You should develop a set of options addressing why or why not to keep all information, and how to identify and dispose of information considered to be ROT (redundant, outdated, or trivial). Find ways to automate as many information management tasks as possible, leveraging business unit workflows and technology.

As a NextGen InfoPro consider taking the following steps:

- Assess your internal expertise and identify and fill the gaps.
- Seek out SMEs in your industry, professional associations, and vendor communities to serve as a mentor and resource.
- Identify new or emerging technologies and assess how they will enhance your operations.
- Assess the needs and requirements to fully support the mobile workforce.
- Campaign for a change in job title away from “Records Manager” to “Information Manager”, “Knowledge Manager” or “Director of Information Governance and Exploitation.”
- Engage with your organization and demonstrate the value you provide.
- And lastly, position yourself to take a primary role in forming your organization’s information management strategy.

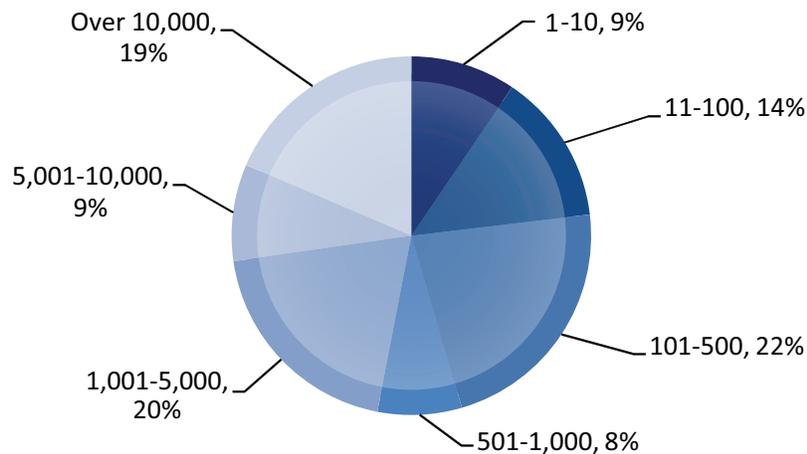
## Appendix 1: Survey Demographics

### Survey Background

The survey results quoted in this report are taken from a survey carried out in May of 2015 with 264 total responses from individual members of the AIIM community surveyed using a web-based tool. Invitations to take the survey were sent via email to a selection of AIIM's 80,000 registered individuals.

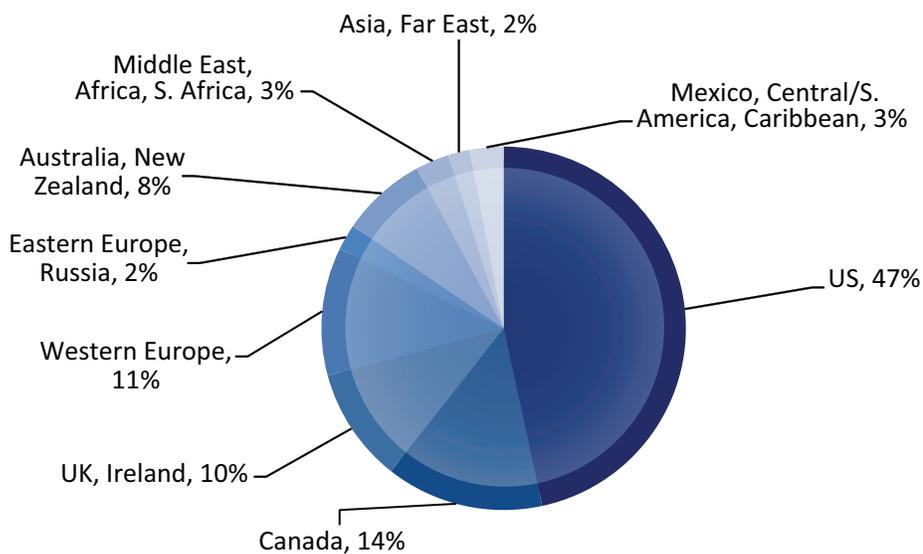
### Organizational Size

Larger organizations (over 5,000 employees) represent 28%, with mid-sized organizations (501 to 5,000 employees) at 28%. Small-to-mid sized organizations (11 to 500 employees) are 45%.



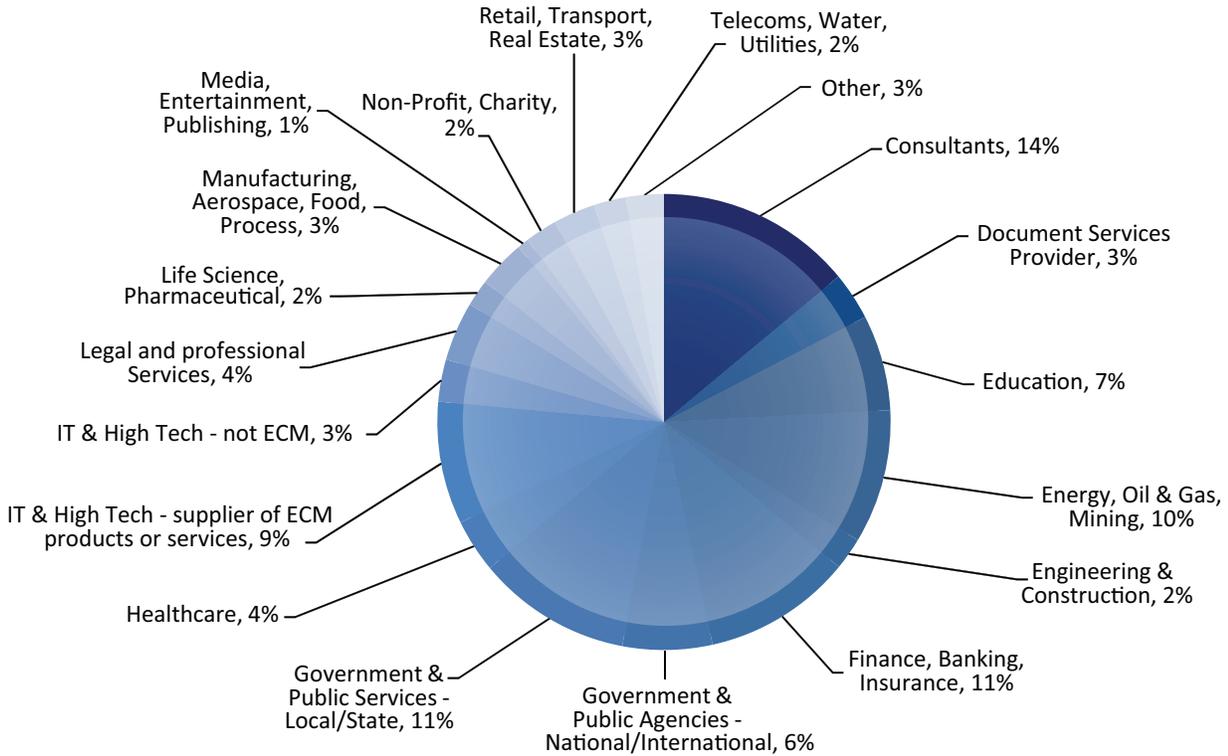
### Geography

The survey was international, with US and Canada making up 61% of respondents, and 21% from the UK and Western Europe.



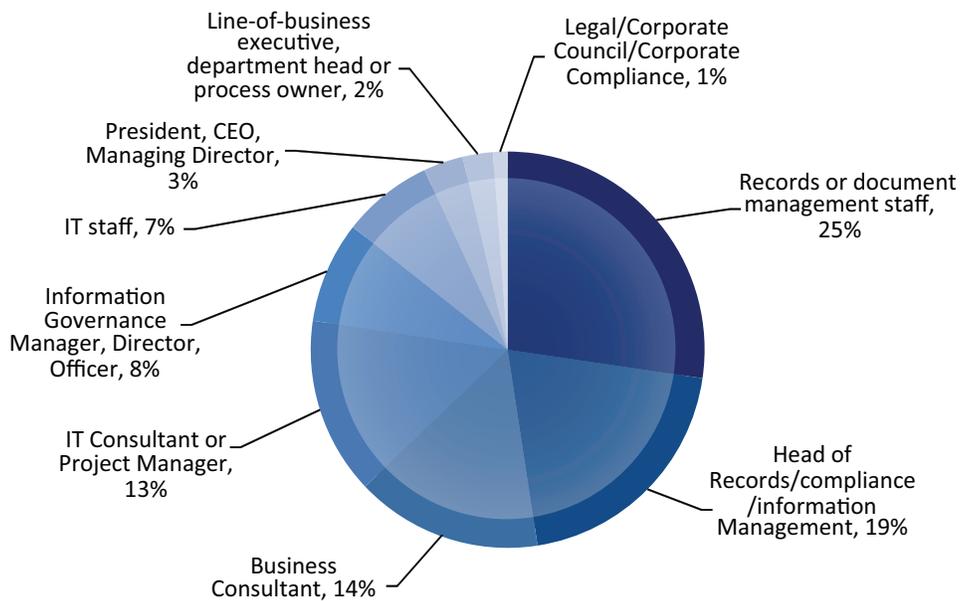
## Industry Sector

Government represents 17%, Finance and Insurance 11% and Energy, Oil, Gas, and Mining 10%.



## Job Roles

44% of respondents say their role is focused on records and compliance, while 14% are business consultants and 20% from IT.



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### About Iron Mountain

Iron Mountain is a storage and information management company, assisting more than 156,000 organizations in 36 countries on five continents with storing, protecting and managing their information.

See more at: <http://www.ironmountain.com/ph/about-us>



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