Challenging Goliath:
Is Microsoft inhibiting enterprise-wide information management?

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My interest in information management dates back to a visit to a conference in Washington in 1979 where I met up with Forest "Woody" Horton. Woody, a former US Army counterintelligence analyst, was passionate about the concept of information resource management (IRM) and had a major role to play in the passing in the USA of the Federal Paperwork Reduction Act of 1980. In essence, IRM treated information as an asset, and for me it provided a framework to pull together all the many elements of managing information that I had acquired in the first decade of my career. If you want to get a sense of Woody's approach, he wrote a brilliant report on information literacy for UNESCO in 2008.

A few years later I got to know Emeritus Professor Don Marchand who was working as a research assistant for Woody. Don went on to become the Dean of the School of Information Studies at Syracuse University and the founder and Director of the Institute for Information Management, Technology and Policy in the College of Business at the University of South Carolina.

In 1996 he moved to the IMD Business School in Lausanne. Between 1997 and 2000 he directed the largest externally funded Partnership Research Project at IMD entitled "Navigating Business Success". This innovative study scientifically examined for the first time the perspectives of senior managers on the effective use of information, people and IT capabilities in improving business performance. The study (funded by Accenture) involved one thousand two hundred managers and over two hundred senior management teams from one hundred and three companies.

From this research Don and his colleagues wrote a series of books about the role of information in decision making, making them pioneers of what you might regard as enterprise information management. Since that time many other books and research papers have been published in an attempt to define "information management" and to assess the impact of good IM practice in many different categories of organisation.

The rise of Microsoft Office 365

To switch to technology, in 2001 Microsoft launched SharePoint as, in effect, a corporate information management application. Over the last fifteen years the scope of this application has been significantly enhanced in terms of functionality, especially since the introduction of Microsoft Office 365 (O365) as a cloud application a few years ago.

There can be little doubt that Microsoft dominates the delivery of desktop information management tools. To be sure there are many other collaboration applications and a growing number of content services platform applications. However, so strong is the Microsoft hold on most IT departments, that any manager wishing to use a non-Microsoft application has a mountain to climb challenging the perceived IT wisdom that Microsoft O365 can solve all known IM challenges. I have seen this visibly in the enterprise search sector where organisations are using the modern interface for O365 totally unaware that it has a search functionality that is not fit for enterprise-wide purposes.

Another major change in organisational management practice over the last decade has been the rise of the edict that "working in teams is the way to business success." The result is that many employees probably spend more time managing their team relationship than they do their personal contributions to the company. There is a very good analysis of these problems from Rob Cross, who developed the concept of Social Network Analysis. The focus is now almost totally on productivity gain, and this is a strong message from not only Microsoft but also Facebook and Google.

The reality is that it is immensely difficult to work out whether there has been a productivity gain, and even if some data was available, the impact on the attainment of corporate objectives is usually very tenuous, as James Robertson illustrated some years ago in his demolition of productivity as the basis of a business case for technology investment.

The last twelve months has seen an avalanche of announcements from Microsoft about the Teams features of Office 365. In effect, Microsoft is saying that the company knows all there is to know about team working and has embedded this knowledge in the Teams functionality. In my view this is going to inhibit organisations from developing solutions that meet their specific requirements, because customising O365 is a very significant challenge. We are seeing this in the intranet business where there is a strong market for both SharePoint/O365-based solutions and also for what I might term independent solutions. Sam Marshall (Clearbox) is planning to extend his intranet vendor report to cover these independent solutions next year.

Invisible roadmaps

One of the benefits claimed for cloud solutions like O365 is that the ability of the vendor to undertake immediate upgrades and fixes means that there is less of a load on IT. Almost every day there is something "new" on O365 and that has two implications. The first is that the Microsoft roadmap is invisible; you know when there is an upgrade when it happens. But this could easily be mid-project. The second is that this may require training and a reconfiguration of the Teams site. Indeed Microsoft seems almost to have released Teams as a beta application, rather than even 80% thought through.

What always happens when enterprise systems do not work is that employees find work arounds. I was looking at a ranked query list for a global company recently and found that the second most popular query term was [Box] with over 100,000 queries in a six-month

period. Looking at ranked query lists is always a good way of spotting work arounds! Try it yourself.

The adoption of workarounds is prevalent in large enterprise content management systems. There was an interesting paper published in 2017 entitled "Information quality, user satisfaction, and the manifestation of workarounds: a qualitative and quantitative study of enterprise content management system users". The article is behind the Springer firewall but the abstract gives a good overview of the research outcomes.

In the 1960s IT departments started to be concerned at the quality and cost of solutions from IBM and Amdahl. Companies such as Digital Equipment and Data General stepped into the market with lower cost, more flexible solutions, and the rest is history. Could we be at a tipping point with Microsoft? Google and Facebook are both committed to their enterprise solutions and have the money to hang in there. A new generation of content services platform vendors is now emerging, and you can download the Gartner Magic Quadrant analysis of this sector from the Alfresco site.

Microservices…unifying disparate applications

Another important development is that of microservices. These are software components that can link together a wide range of disparate applications. The model for this approach goes back to the Enterprise Portal applications that were the vogue in the first decade of this century but were ahead of the capabilities of the core software. Inevitably with IT, with flexibility comes complexity, but IT and business managers may well be considering if a monolithic adoption of Microsoft technology is no longer the optimum strategy. There is an increasing number of analyses that compare Google and Microsoft as productivity tools, and this is just one example.

I have been saddened over the last year or so to see the enthusiasm with which the Microsoft consulting community has greeted each new release. Among the exceptions is Sam Marshall. Technically the upgrades are impressive, but will they enhance or hinder the way in which your organisation works?

Never has there been a more important time to have an information management roadmap based on a blend of business objectives and user requirements. You need this as a benchmark to assess what level of resource you should invest in adopting enhancements (especially training) in whatever desktop IM application you are using. In addition, it will provide you with the basis to decide what the optimum mix is of applications in what will be an increasingly federated IM arena.