

Evolving Toward the Next Phase of Email

An Osterman Research White Paper

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EXECUTIVE SUMMARY

According to most corporate decision makers and influencers, email is the single most important application they have deployedⁱ. The typical user spends two hours per day working in the corporate email system and sends or receives a median of 130 emails per day. Moreover, email is the primary method for:

- Sending an attachment for 94% of users,
- Sharing files while on a call for 60% of users, and
- Managing a project for 56% of usersⁱⁱ.

In addition to email, users are increasingly employing a variety of other cloud-based and mobile tools that offer collaboration, enterprise processes like CRM, file sync and sharing, file transfer, and social networking. Some of these tools are deployed by the corporate IT department, but a growing number of them are deployed by individual users to solve specific problems or to gain functionality that is not available from corporate IT.

The result of this growing mix of on-premises, cloud, mobile, IT-managed, user-managed and other applications is not only that users are not as efficient as they could be and corporate productivity suffers, but that the entire organization is at risk from sharing confidential or sensitive information on unsecured devices. In order to enhance productivity, security and the user experience, a change is necessary.

KEY TAKEAWAYS

- The conventional wisdom is that email is being replaced by social media and other, next generation communication and collaboration tools. The reality, however, is that email use continues to grow.
- Email will remain the dominant communications tool in the workplace, but it will evolve in a variety of ways toward completely transparent accessibility across all delivery modes and platforms, an embedded application experience that will enable users to work with applications in the context of the email experience, and greater integration of social capabilities within email.
- As businesses look to create a more effective workforce, and at the same time reduce cost and streamline operations, social collaboration platform solutions including IBM Connections and IBM Domino can be used to engage employees, customers and partners, collaborate and share expertise, innovate more quickly, and cultivate a competitive advantage in the marketplace.

Consequently, enterprises should continue to view email as a primary delivery model for communications and collaboration, but focus on the evolution of email as a platform for the integration of social technologies and enterprise processes.

ABOUT THIS WHITE PAPER

Osterman Research conducted a survey during March 2014 with 294 information workers to determine how they employ email, how they manage various information-focused work processes, and the changes they would like to see in these processes. Information from this survey is included in this paper, along with other Osterman Research survey data, as appropriate.

This white paper was sponsored by IBM. Relevant information about the company and IBM Mail Next are included at the end of the paper.

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HOW DO INFORMATION-FOCUSED EMPLOYEES WORK?

HEAVY RELIANCE ON EMAIL

Our research found that the typical email user sends a median of 30 emails during a typical workday and receives a median of 100 emailsⁱⁱⁱ, resulting in traffic of roughly 33,000 messages per user per year. An organization of 5,000 information workers will generate and receive in excess of 165 million email messages annually.

Moreover, our research found that the typical information worker spends a median of 120 minutes per day in email. This time is not spent just sending or receiving emails, but also using email for a variety of activities: managing daily tasks, searching for contacts, looking for messages sent to or received from co-workers, looking for documents, and using email as a de facto filing system for important documents.

It is also important to note that the conventional wisdom that email is being replaced by other tools is simply not true: our research found that for 52% of those surveyed, use of email had actually increased over the previous 12 months and had stayed at roughly the same level for another 44%. We found that for only 3% of information workers had email use actually declined.

MOST USERS HAVE EMBRACED THE CONSUMERIZATION OF IT

Another major Osterman Research survey conducted in 2013^{iv} found that the majority of information workers have embraced the “consumerization” of IT, or what we call the trend toward Bring Your Own Devices and Applications (BYODA). Our research found that BYODA is quite well entrenched across organizations of all sizes, so much so that personally-owned smartphones and tablets are found in a larger proportion of organizations than are employer-supplied and managed devices.

Our research also found that employee-deployed, cloud-based applications are widely used – for example, tools like Dropbox, Apple iCloud and Google Docs are used in more than one-half of the organizations we surveyed. Moreover, a March 2014 Osterman Research survey found that 73% of users employ applications that they downloaded themselves to a mobile device for work-related purposes^v. The same survey found that one in 21 users employs a personally owned mobile device as their *primary* platform for accessing corporate email^{vi}.

GROWING USE OF CLOUD-BASED TOOLS AS POINT SOLUTIONS

The use of cloud-based tools as point solutions to solve specific problems is increasing. Among the most popular of these tools are file synchronization and sharing tools like Dropbox, Apple iCloud, Google Drive, IBM Connections/SmartCloud Connections, Microsoft OneDrive (Skydrive), Box and many others. A variety of other cloud-based tools is also finding increasing use for other purposes, such as file transfer, telephony, videoconferencing, CRM, etc.

While many of these tools have been deployed by individual users to solve specific problems or to provide additional functionality that cannot be obtained from the corporate IT department, a growing number of companies are migrating specific capabilities to the cloud.

USERS AND ORGANIZATIONS ARE INCREASINGLY RELIANT ON MOBILE DEVICES AND APPLICATIONS

The result of the trend toward consumerized IT is that information workers and their employers are growing increasingly reliant on mobile devices and applications, both cloud-based and local apps installed on their devices. The 2013 survey noted above found that corporate decision makers support personally owned devices because they

Corporate decision makers support personally owned devices because they believe them to be important or very important for a variety of reasons.

believe them to be important or very important for a variety of reasons, as shown in Figure 1.

Figure 1
Reasons for Supporting Personally Owned Devices
% Responding Important or Very Important

Driver	1,000+ Employees	100-999 Employees	Up to 99 Employees
Increase productivity and making employees more productive on mobile devices	68%	72%	62%
Keep employees happy by permitting them to bring their own mobile devices to work	60%	60%	85%
Reexamine how we engage with our customers, partners and suppliers and think through the impact of making core critical services available on mobile devices	48%	42%	31%
Mobile enablement is a way to get ahead of the competition and sustain competitive advantage	47%	52%	54%
We are committed to leveraging the cloud for IT services and enabling enterprise mobility as a critical piece of our journey to moving workloads onto the cloud	35%	32%	31%

Source: Osterman Research, Inc.

Moreover, employees can be more efficient and effective in their work if they are enabled with capabilities that give them seamless access to all of their files, communications tools and other services from any location using a single platform. The importance of mobile access was underscored in a January 2014 Osterman Research survey of 289 end users^{vii} that found 33% of end user’s work-related time was spent working on a mobile device, while 52% was spent working on a desktop computer; the remaining 15% of employee time was spent not working on either platform.

SOCIAL NETWORKING IS A KEY PART OF THE USER EXPERIENCE

The impact of social networking as an essential component of the corporate user experience cannot be underestimated. While many of the leading social networking tools, such as Twitter and Facebook, are widely used by individual employees independent from any corporate initiative, they are increasingly used for work-related purposes.

Moreover, corporate decision makers are opting to deploy enterprise-grade social networking tools because of their ability to provide an information sharing and intelligence platform for employees and business partners. Social networking tools can speed decision making because users have improved access to current information, more ready access to expertise across the organization that otherwise would be very difficult to find, and better collaboration functionality.

TRADITIONAL EMAIL HAS CHALLENGES

Traditional email, while still the most widely used communication tool in almost all organizations and the most popular method for sharing files, has a number of problems:

- **Email is primarily a point solution**
 Email remains largely a point solution focused on sending and receiving email messages. While email clients and Webmail typically include calendaring, task management and other types of functionality, the primary goal of email continues to be the transport of email messages and payloads.

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- **Content is difficult to find**

At a corporate level, content is relatively difficult to find in most email systems, particularly older information. For example, an Osterman Research survey conducted in late 2013^{viii} found that 85% of organizations consider that they are well prepared to find email that is up to one month old. However, for email that is up to six months old this level of confidence falls to 72%; for email older than six months it falls to 51%. Individual email users face the same problems. Because two-thirds of mid-sized and large organizations impose mailbox size quotas on their users^{ix}, individuals will often store email in local message stores in order to remove it from their inbox, or simply delete older email.

- **Information and content are siloed**

Message flows and content in most email systems are siloed and are not readily available to other tools. This creates problems for workgroups and other teams that should have access to this content, but do not have it because of the siloed nature of the email experience.

- **File transfer is not efficient**

Because email is easy to use and ubiquitous, most users rely on it to send attachments. In fact, Osterman Research has determined that 98% of the bits that flow through the typical corporate email system are the files attached to emails and not email messages themselves. However, when used for file transport, email system performance can suffer, mailboxes become bloated with content, email server backups take longer to execute, server restorations take longer, and email system downtime is more frequent. File-size limits can address this, but they create other problems, such as users turning to personally deployed file sync and share tools or personal Webmail.

- **Collaboration via email is problematic**

Although most users employ email as a rudimentary collaboration tool, email systems do not function well in this role and cause version control issues when multiple users are editing or creating documents, slow response time because users must wait for documents, and difficulty searches for information.

- **Lack of real-time interaction**

Finally, email systems were never designed to be real time communications tools and generally cannot be used efficiently in this capacity.

THE EVOLUTION OF EMAIL

CONVENTIONAL WISDOM VS. REALITY

Many believe that email is being replaced by social media and other, next generation communication and collaboration tools. For example, a well-respected analyst firm predicted in 2010 that 20% of firms would replace email with social networking tools by 2014^x. While the conventional wisdom is that email use is waning and is being replaced by messaging functionality in social networking tools, text messaging on mobile devices, real time communications tools and other forms of communication; the reality is that email use continues to grow year over year. Business users spend more time in email on a daily basis than they do on the telephone and using real time communications tools combined. In short, email is not going away.

The fundamental business problem is that most communications tools are more or less standalone siloes that do not interoperate or share information. For example, most people cannot easily send an email, have the most relevant and time-sensitive tasks presented to them, or use social networking tools from a single communications platform. Instead, users move from one interface/tool/platform to another for various forms of communications and interaction with applications. This creates a significant amount of friction in business communication and slows users' ability to respond to others or have the right information available to them in a timely or efficient manner.

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While email use will continue to grow, the nature of email will evolve to what some might consider to be a clearinghouse for various communication modes that will make users more efficient and information less siloed.

IBM SmartCloud Notes and IBM Notes and Domino 9 Social Edition lead in the evolution of email by extending and enriching the email experience with built in social, mobile and application developments capabilities. This will continue with IBM Mail Next.

WHAT NEEDS TO CHANGE?

The evolution of email will require a variety of changes to the current email paradigm in order for it to continue to be a relevant and useful tool, and to prevent the continued fragmentation of the user experience across a large number of mostly disconnected application experiences.

INTEGRATION OF APPLICATION FUNCTIONALITY INTO A COHESIVE USER EXPERIENCE

Today, the current email paradigm is something akin to a “launch pad” – users receive notifications from a variety of applications, such as CRM systems, social networking tools, travel reservation systems, content management systems, expense reporting systems, and a growing number of other corporate and personally managed applications. The typical user experience involves receiving a notification, clicking on a link, and then leaving the email experience to open the application that sent the notification. When the task has been completed, the user returns to the email platform. For the typical user, this is a regular occurrence and can be repeated dozens of times per day.

The new email paradigm will involve an embedded experience. As in the current paradigm, users will receive notifications from a variety of systems. However, instead of clicking on a link to launch a different application, users will be able to respond to the application without ever leaving the context of their email experience. For example, if a manager receives a request to authorize travel for an employee, he or she will be able to do so within the email message that was generated by the travel reservation application. Notifications from a CRM system could be managed directly within the notification email instead of the user launching the CRM application itself. Document content could be reviewed directly within email instead of launching a separate content management system.

An important benefit of this approach to email is that it provides a much more cohesive user experience than the current paradigm of regular application switching. Perhaps more importantly, it allows the integration of disparate data streams into a more cohesive content stream that will make archiving, search and policy management easier.

COMPLETELY TRANSPARENT ACCESSIBILITY

One of the fundamental changes that needs to occur is that the email experience must be completely transparent across all delivery models and platforms. This means that whether the email experience is delivered via traditional on-premises servers and software or delivered via the cloud, the accessibility to all applications and the entire user experience must be optimized for the use cases best suited to each device or access method: thick client, Web browser, tablet or smartphone. This is essential in order to maintain the continuity of the user experience and to maximize user productivity.

Osterman Research has found that both on-premises and cloud solutions are employed by users extensively in the context of their work: a March 2014 survey found that 55% of users employ only on-premises systems to access email, files and other information, 6% use only cloud-based systems and 39% use a combination of

*The new email
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both.

BETTER INTEGRATION OF SOCIAL IN THE CONTEXT OF THE EMAIL EXPERIENCE

Another benefit of the new email paradigm is that it integrates social networking capabilities with email so that users do not have to move back and forth between the two. For example, the new email paradigm will enable users to see social media activity streams, monitor and participate in microblogging, track projects, share files, identify participants involved in relevant projects, and manage a variety of other social tasks all from within the email client. While all of these capabilities are available today, in most cases they are managed from a set of siloed applications that are not designed to share content with one another.

SHIFTING VARIOUS ACTIVITIES TO MORE EFFICIENT MODES

Ultimately, the new email paradigm will be focused on integrating various activities into the email experience so that users can do more work from email and less from individual applications. Among the various benefits of this approach are:

- A more efficient user experience because of the ability to manage tasks within the email context instead of switching between a variety of applications.
- Content streams will be more tightly integrated, making archiving, legal holds, eDiscovery and regulatory compliance easier, more complete and less subject to error.
- Searching for content will be easier because of the integrated nature of information management in the new paradigm. Moreover, content will be available in both a time and information context, such as being able to identify how users interact with one another as they communicate via email messages, microblogging and file sharing activities.

The bottom line is that users want to improve the way they work, but they want to do so within the context of the email experience. The next generation of email will permit them to do that. With the powerful email, social, mobile and application development and deployment capabilities built into Notes and Domino 9 Social Edition and SmartCloud Notes, for a seamless end user experience, IBM already has the solution. As users traverse from email to embedded applications to their social network of data and people to get their work done, companies can expect heightened end user satisfaction and enhanced productivity across their organization.

NEXT STEPS

Osterman Research recommends that decision makers undertake several steps as they assess the future of their communications and collaboration requirements:

- Understand how, when, where and why users employ email, social networking, file sharing, mobile applications and other technologies necessary to do their work. The goal here is to understand user behavior and where changes and improvements might be needed.
- Undertake process maturity assessments to understand how CRM, collaboration, search, social and other key business functions are carried out by users, departments and workgroups. The goal of this exercise is to help decision makers understand existing workflows and work processes and how best to improve them, and to understand where friction occurs between processes, such as when sharing information between information siloes.
- Develop a long term plan for how services will be delivered: on-premises, in the cloud or via a hybrid implementation. This is essential, since the roadmap of

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vendors whose technologies are already in place within the enterprise may be at odds with preferred long term delivery models, necessitating a change of vendors for key business processes.

- Identify the resources that will be available to carry out the long term plan. An important component of this evaluation is to analyze the opportunity costs associated with using IT and other technical staff for various initiatives and how best to optimize their value within the organization.
- Finally, evaluate technologies that will help the enterprise to achieve its long term goals for communication and collaboration: maximizing user efficiency and satisfaction, and securing information flows regardless of the platform that users employ.

About IBM Social Collaboration Platform: IBM Connections and IBM Domino

The **IBM social collaboration platform** transforms business processes through integrated collaboration capabilities including email, newer social collaboration tools, chat, meetings, social document collaboration, file sharing and more. These capabilities can be extended through Open APIs to and with virtually any application or mobile device. Key components of the platform include IBM SmartCloud Engage Advanced (on cloud) and **IBM Notes and Domino 9 Social Edition**, IBM Connections Suite (on premises). . The platform can be delivered on cloud, on premises or hybrid environment depending on business requirements. .

To learn more visit the IBM Platform for Social Business site: <https://ibm.biz/BdFcUY>

IBM Notes and Domino 9 Social Edition (on premises) and IBM SmartCloud Engage Advanced plus IBM Domino Applications on cloud cost-effectively bring together business messaging, applications and social collaboration. They deliver social capabilities whenever and wherever users are working, helping to accelerate business operations, improve decision making, and enhance productivity.

IBM Connections Suite (on premises) and SmartCloud Engage Advanced (on cloud) delivers the market's #1 social collaboration platform, including capabilities such as rich profiles, communities, file sharing, activities, blogs, wikis, chat, meetings, audio and video collaboration, social content management, and business messaging. Because it is a platform built on open APIs, you can quickly integrate and extend these capabilities across your business environment.

IBM Sametime (on premises) and IBM SmartCloud Meetings and IBM SmartCloud Chat (on cloud) integrate real-time social communications into your business environment, providing a unified user experience through instant messaging, online meetings, voice, video and data.

And, with the vision of **IBM Mail Next**, IBM is re-thinking the email experience entirely. Delivered on cloud, IBM Mail Next will help you focus on your work, not your inbox, through new and faster search and new ways to tune into who and what is important to you. The use of IBM Design principles in the development of the IBM Mail Next experiences should delight, as is it heavily based on audience research on their interactions, workflows and how they are connected to their work. Visit IBM Design at <http://www.ibm.com/design/>

FITTING THE WAY THAT PEOPLE WORK AND THE WAY THAT IT WANTS TO STREAMLINE BUSINESS INFRASTRUCTURE

The capabilities delivered in the IBM social collaboration platform fit with the way information-focused employees want to work and the way IT departments want to streamline business infrastructures for more cost-effective, secure and reliable operations. IBM supports your business objectives because our technologies are about putting people back at the center of your business:

- **Empower people**
Connect seamlessly by installing personalized social collaboration solutions onto almost any device—mobile, web and desktop—making it easier to engage and innovate just about anywhere.
- **Engage people**
Work smarter with insights gathered from powerful, highly intuitive social analytics and metrics that help you drive adoption and deepen your relationships.
- **Trust people**
Expand your collaboration beyond organizational boundaries to include customers, partners, vendors and contractors with a security-rich platform.
- **Extend technology**
Integrate and embed business collaboration, analytics and content capabilities within existing business processes and investments.

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