

Electronic Records Management:

For Most, It's Still "Waiting for Godot"



AIIM Industry Watch Survey

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ABOUT AIIM – The Enterprise Content Management Association

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AIIM is the international authority on Enterprise Content Management (ECM), the technologies used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM tools and technologies provide solutions to help users with the four C's of business: Continuity, Collaboration, Compliance, and Costs.

For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire ECM industry - including users, suppliers, and the channel - acts as the industry's intermediary.

As a neutral and unbiased source of information, AIIM serves the needs of its members and the industry by providing educational opportunities, professional development, reference and knowledge resources, networking events, and industry advocacy.

AIIM provides:

Market Education - AIIM provides unbiased information through its ECM Solutions Seminar (held throughout the U.S. and Canada); the Managing Information and Documents Road Show (held throughout the UK); Infolreland (held in Dublin); AIIM Webinars; AIIM E-DOC Magazine and our online Solution Centers for financial services, healthcare, and state & local government.

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THE AUTHOR



John Mancini has been President of AIIM since May 1996. Working together with the AIIM Board, staff, and thousands of volunteers around the world, his goal is to help AIIM connect the users and suppliers of enterprise content management (ECM) technologies and services. Prior to joining AIIM, John spent 11 years in various positions at the American Electronics Association in Washington, D.C., most recently as Executive Vice President and Chief Operating Officer. The American Electronics Association is the nation's largest technology trade group. John holds a Bachelor's degree from the College of William and Mary and a Master's degree from Princeton University.

KEY FINDINGS

Managing Electronic Information Still #2 Priority in Most Organizations (vs. Paper)

In general, end users believe they have done a reasonable job of putting in place formal programs to manage paper-based information. When it comes to electronic information, in general organizations report far less structure.

Many Records Management Programs Just Cover the Tip of the Iceberg

As the survey pushed participants for more granularity with regards to their records and information management program, it became apparent that many end users have yet to address important elements in a truly comprehensive program.

Organizations—Especially Medium Sized Ones—Are Vulnerable to New e-Discovery Rules

There are some aspects of the new e-Discovery rules announced December 1, 2006 (such as the safe harbor for inadvertent deletions) that are positive, given the extremely ambiguous legal environment that exists for “electronically-stored information” (the term used in the new rules). However, as is evident from the results of this survey (and other AIIM industry Watch surveys), the expectation that the new rules create—that organizations have control over their electronically-stored information—is problematic at best for most organizations.

In Searching for an Electronic Records Solution, Organizations Stress the Basics

The decision to implement an electronic records management solution hinges on three primary drivers: “improve efficiency and productivity,” “compliance,” and “risk management/business continuity.” It is surprising that even in a survey specifically focused on records management, and with a sample dominated by “document management specialists,” the “productivity” and “efficiency” benefits of RM technologies are understood and valued.








RM Outsource Opportunities Exist, Especially as RM Requirements Grow More Complex

As organizations struggle with the complexity of records management requirements, they are increasingly realizing that an outsourced solution is at least something that should be considered. The reason for the shift is the increasing risks of “doing it wrong,” and the increasing complexity of “doing it right.”








ABOUT THE SURVEY

This survey was delivered via an on-line survey instrument (www.zoomerang.com) during the 4th quarter of 2006. A total of 821 end users participated in the survey. The participants reflect a broad sample of organizations in terms of size, with 17% drawn from small organizations (less than 100 employees), 26% from mid-sized organizations (100-1,000 employees), and the remainder from large and very large organizations (more than 1,000 employees).








The results reported in the survey highlight the major findings from the survey. A complete question set, along with breakouts of the data by company and organization size, can be found in the appendix.

Approximately how many employees are there in your ORGANIZATION as a whole?			
1 to 100		141	17%
101 to 500		112	14%
501 to 1,000		102	12%
1,001 to 5,000		174	21%
5,001 to 10,000		81	10%
10,001 to 50,000		139	17%
Over 50,000		72	9%
Total		821	100%



















There was heavy participation in the survey by those that could be considered “closest to the action” in their organizations with regards to document and records management. Over half of those participating described themselves as “document management specialists.” This category includes, but is not limited to, those who are records managers within their organizations. The percentage of document “specialists” in this survey is higher than is typical for other AIIM surveys.

Pick the choice that best describes your role within your organization:			
President or CEO		46	6%
Line-of-business or process owner		114	14%
Document management specialist		447	56%
CIO, IT executive or IT manager		149	19%
CFO or finance executive		12	2%
Legal counsel		12	2%
Security manager or executive		17	2%
Total		797	100%

Almost 60% of the respondents were from the U.S., followed by the United Kingdom (14%), Canada (13%), rest of Europe (6%). End users from 49 countries participated in the survey.

In which country are you located?			
Australia		17	2%
Brazil		5	1%
Canada		103	13%
France		3	0%
Germany		6	1%
United Kingdom		115	14%
United States		488	59%
Other, please specify		85	10%
Total		822	100%

A significant number of participants (26%) were from government at all levels, followed by financial services, including banking, finance, insurance (13%), utilities, oil and gas (8%), professional services/consultants (8%), manufacturing and engineering (6%), and education (6%).

In which industry sector does your organization operate?			
Banking & Finance		71	9%
Insurance		37	4%
Chemicals & Pharmaceuticals		38	5%
Construction & Building		4	0%
Consultant		63	8%
Education		48	6%
Govt & Pub Serv – Federal or National		72	9%
Govt & Pub Serv – Provincial or State		54	7%
Govt & Pub Ser – Local, County, or Town		99	12%
Healthcare		27	3%
IT – NOT in the ECM industry – HARDWARE		5	1%
IT – NOT in the ECM industry – SW or SERV		18	2%
IT – a provider of ECM products and services		0	0%
Legal		23	3%
Manufacturing & Engineering		52	6%
Non-profit		18	2%
Retail		4	0%
Telecommunications & Media		18	2%
Transportation & Distribution		13	2%
Utilities, Oil & Gas		65	8%
Wholesale		1	0%
Other, please specify		94	11%
Total		823	100%

Managing Electronic Information Still #2 Priority in Most Organizations (vs. Paper)

Throughout the survey, we were specific in identifying whether the question related to the management of INFORMATION or RECORDS or both. Participants were asked to interpret the term INFORMATION management as referring to the general use and management of information of all types (paper, structured electronic information, unstructured electronic information). Participants were asked to interpret the term RECORDS MANAGEMENT as referring to the subset of information that is expressly classified and retained as official organizational documentation.

In general, end users believe they have done a reasonable job of putting in place formal programs to manage paper-based information. Over 60% of end users report they have formal programs in place to manage paper-based records, the security and privacy of paper-based information, compliance, and disaster recovery.

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to PAPER-BASED information:

Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	YES	NO	Not sure
Classification of information as records	605 74%	176 21%	38 5%
Information Security	637 78%	119 15%	61 7%
Data Privacy	616 76%	118 14%	80 10%
Disaster Recovery/Business Continuation	557 68%	185 23%	75 9%
Database Management	518 64%	176 22%	116 14%
Risk management	470 58%	199 25%	140 17%
Litigation Readiness	355 44%	251 31%	202 25%
Regulatory Compliance	560 69%	150 18%	104 13%

When it comes to electronic information, in general organizations report far less structure. Those reporting formal programs for managing the electronic information needed for regulatory compliance were 12 percentage points less than for paper-based information, and 17 percentage points lower when dealing with the classification of electronic records vs. paper records.

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to ELECTRONIC information:

Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	YES	NO	Not sure
Classification of information as records	466 57%	303 37%	48 6%
Information Security	686 84%	88 11%	43 5%
Data Privacy	624 76%	123 15%	69 8%
Disaster Recovery/Business Continuation	631 77%	120 15%	66 8%
Database Management	573 71%	133 16%	103 13%
Risk management	424 53%	217 27%	165 20%
Litigation Readiness	292 36%	309 38%	206 26%
Regulatory Compliance	463 57%	213 26%	135 17%

The data suggests that organizations of all sizes are relatively mature in paper-based records management. Except for the smallest organizations (less than 100 employees), typically 75%-80% of survey participants report a formal program for paper-based records management. There is a significant drop-off when the focus shifts to electronic records. Typically only 55%-60% report a formal program to manage electronic records; among organizations with 5,000-10,000 employees, the percentage drops to less than half, 48%.

	% with a records management program—PAPER	% with a records management program—ELECTRONIC
State and local government	77%	57%
Financial services	79%	57%
Manufacturing and engineering	71%	54%
Utilities, oil, and gas	83%	63%

The most significant weakness in the management of paper-based information relates to litigation readiness (also a significant weakness on the electronic side). Given the recent changes in discovery and e-Discovery rules (new changes in Federal Rules of Civil Procedure announced December 1) this weakness in managing both paper and electronic information will become more of a strain in the months ahead for many organizations.










Mid-sized organizations are particularly vulnerable in this regard. The percentages that report specific programs relative to litigation readiness are as follows:

	% with a litigation readiness program—PAPER	% with a litigation readiness program—ELECTRONIC
101-500 employees	39%	27%
501-1,000 employees	40%	34%
1,001 to 5,000 employees	42%	37%

Many Records Management Programs Just Cover the Tip of the Iceberg

As the survey pushed participants for more granularity with regards to their records and information management program, it became apparent that many end users have yet to address important elements in a truly comprehensive program.

Over 70% of formal programs include such basic elements as retention, appropriate use of e-mail, and ownership of information assets. This is consistent with past AIIM surveys. However, as more complicated issues are addressed—i.e., confidentiality, extension of policies down the supply chain, and control of remote information—the percentage of end users typically reporting a formal program drops by 40-50%.

Indicate if your organization has specific policies or procedures that address the following issues. (Check all that apply.)			
Ownership of records and information, i.e., who owns the information created and received by an organization.		547	69%
Employee privacy at work, i.e., the employer's right to monitor and review employee email.		611	77%
Records retention and/or classification		620	79%
Email usage: e.g., business vs. non-business communications, storage, purge, archival		563	71%
Classification or coding of information, i.e., as confidential, vital, or trade secrets.		389	49%
Transmission of confidential or trade secret information.		414	52%
The applicability of your organization's information management policies to third parties, such as contractors.		410	52%
The applicability of your organization's records management policies to third parties, such as contractors.		346	44%
Rules for telecommuters, mobile workers, and "road warriors" using notebook computers and other devices outside the office.		392	50%

Significant gaps with regards to the more complicated issues associated with information management are particularly evident in looking at organizational size. For example, only 41% of mid-sized organizations (101-500 employees) report policies and procedures related to transmission of confidential data, 34 points lower than that reported by the largest

organizations (over 50,000 employees). The same carries through to extending information management policies through the supply chain and to applying information management policies to remote workers (both are 27 points lower for those with 101-500 employees).

The surface nature of many programs is evident from a few somewhat basic questions related to executive communications, policy statements, and training. These are core indicators relative to the seriousness of a program, and one would expect to generate a much higher positive response.

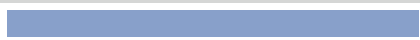

For example, barely 60% of user organizations report receiving an executive communication over the past 18 months about records and information management issues. Only 47% have a statement outlining a records or information management policy in employee manuals. Only four in ten end user organizations provide training programs for employees on records and information management.

Again, mid-sized organizations have gaps in their programs, exposing their organizations to significant risk.



	Statement about RM in employee manual? % YES	Employer takes RM seriously? % STRONGLY AGREE
101-500 employees	42%	28%
501-1,000 employees	48%	30%
1,001 to 5,000 employees	43%	24%
Over 50,000 employees	65%	50%

A few comments from participants are illustrative of the challenge of matching actions to intent in many organizations:

- Executives don't view "records issues" as worthy of their direct attention.
- We have just a broad statement that records management is important. There was no action to substantiate the statement.
- Records and information management is still the last thing on their minds.
- The policy is vague and not easily found -- most employees don't know where to find it and it leaves RIM up to the business units.
- Records management is not even mentioned in new employee orientation.
- It is my opinion that Records are a very low priority here.

Has an executive communicated with you via an internal memo, email message, or presentation about records and information management issues in the past 18 months?			
Yes		492	61%
No		320	39%
Total		813	100%

Is there a statement from your CEO or other high-level executive regarding the importance of records and information management that is a standard part of your employee manual, records management manual, or other policy or procedure that is provided to all employees?			
Yes		387	47%
No		428	53%
Total		817	100%

Does your organization regularly deliver training for employees on records and information management issues?			
Yes		338	41%
No		479	59%
Total		817	100%

This gap between actions and intentions is reflected in other questions as well. 75% of end users “strongly” or “somewhat” agree with the statement, “My organization takes records and information management issues seriously.” When enforcement of policies is considered, though, the gaps in programs emerge. Only 39% “strongly” or “somewhat” agree that “records and information management directives are consistently enforced.”

A look at the vertical breakouts highlights the lack of rigor that characterizes many records and information management programs. For example, only 5% of state and local officials would agree that their organizations are serious about records and information management.



	“Takes records and information management seriously” STRONGLY AGREE	“Records and information management directives consistently enforced” STRONGLY AGREE
State and local government	27%	5%
Financial services	44%	18%
Manufacturing and engineering	27%	10%
Utilities, oil, and gas	40%	11%

Organizations—Especially Medium Sized Ones—Are Vulnerable to New e-Discovery Rules

There are some aspects of the new e-Discovery rules announced December 1, 2006 (such as the safe harbor for inadvertent deletions) that are positive, given the extremely ambiguous legal environment that exists for “electronically-stored information” (the term used in the new rules).

However, as is evident from the results of this survey (and other AIIM Industry Watch surveys), the expectation that the new rules create—that organizations have control over their electronically-stored information—is problematic at best for most organizations.

This is particularly clear in the context of e-Discovery. Barely half of those participating in the survey responded positively to the question, “Does your organization have a formal process for ensuring that all information potentially relevant to pending or current lawsuits, audits, and/or investigations?”

Does your organization have a formal process for ensuring that all information potentially relevant to pending or current lawsuits, audits, and/or investigations is preserved? Such processes are often called “Records Hold,” “Legal Hold,” or “Disposal Suspension.”			
Yes		428	53%
No		380	47%
Total		814	100%

The “good news” about the new Federal Rules for Civil Procedure are that they finally establish a framework for the management of electronically stored information. The “bad news” is that organizations are expected to measure themselves against this framework.

This is an area in which the largest companies have at least tried to make headway. In response to the question of whether a formal process exists relative to “Records Holds” or “Legal Holds,” 84% of the largest organizations in the survey (over 50,000 employees) responded “YES.” For most organizations with 101 to 5,000 employees, though, typically less than half have such procedures.

Medium-sized organizations in particular seem to have engaged in wishful thinking or rationalization over the past five years as it increasingly became apparent that the bar was rising in terms of managing electronic information. Many organizations reacted to Sarbanes-Oxley by concluding, “It doesn’t relate to us. We’re not a public company.” The same logic seems true in the reactions to the information management requirements of HIPAA. Or countless other compliance and regulatory requirements related to information management.

Organizations will not be able to escape the expectations associated with the new Federal Rules of Evidence and e-Discovery. They apply to organizations of all sizes and in all segments.

Once again, the comments are illustrative of the challenge facing many organizations:

- *We have an informal policy that the RM Clerk will be notified so these documents can be labeled and stored in a vault. As it is informal, it is not always followed.*
- *As with all questions of policy -- the policies are on paper, but compliance by employees is not enforced. No mechanism exists for enforcement except in the occasional case of an audit or a call for information from a higher command.*
- *Paper is nailed down. Electronic is still being refined.*
- *This is an area of risk that has been identified to management, however no steps to formalize a process/policy have been initiated at this time.*

- *We have procedures for communicating Legal Holds; however, no procedures in place to ensure compliance. No training offered as of yet, but that is something we will be addressing.*
- *We used to, but there has been so much turnover in our Law department that our Litigation Hold process got lost somewhere along the line!*
- *One of our biggest current gaps.*

State and local governments appear to be quite unprepared to the new world of e-Discovery, with less than half of those surveyed reporting a formal policy to handle “Legal Holds” and “Records Holds.”

	“Formal process for legal holds or records holds?”
State and local government	45%
Financial services	69%
Manufacturing and engineering	65%
Utilities, oil, and gas	58%

In Searching for an Electronic Records Solution, Organizations Stress the Basics

The decision to implement an electronic records management solution hinges on three primary drivers: “improve efficiency and productivity,” “compliance,” and “risk management/business continuity.” It is surprising that even in a survey specifically focused on records management, and with a sample dominated by “document management specialists,” the “productivity” and “efficiency” benefits of RM technologies are understood and valued. Past AIIM surveys focused on capture and ECM have reached similar conclusions. It is important that suppliers and resellers demonstrate not only the compliance and risk reduction benefits of an electronic records management solution, but also the major efficiencies gained from a deployment.









Think about the reasons why you might implement electronic records management technologies in your organization. Please check the TWO that are the MOST important (please check only TWO).

Compliance		401	50%
Leadership, competitive advantage		50	6%
Improve efficiency and productivity		480	60%
Risk management/Business continuity		297	37%
Better customer service		144	18%
Reduce costs		147	18%
Faster turnaround, improved response		121	15%
Increased profits, better performance		51	6%

There is significant variation in how vertical segments view these market drivers. Those in the public sector—perhaps because of the close link between these systems and their ability to satisfy constituent demands—clearly understand the link between effective records management and efficiency and customer service. State and local employees are clearly on the front lines when it comes to the customer impact of their records management system choices. The drivers for the private sector respondents were significantly more focused on avoiding risk than improving service.

	Manuf	Util	Finance	S&L Govt
Compliance	67%	62%	59%	40%
Leadership, competitive advantage	4%	6%	4%	2%
Improve efficiency and productivity	67%	61%	50%	72%
Risk management/Business continuity	35%	45%	50%	24%
Better customer service	2%	8%	13%	34%
Reduce costs	18%	14%	21%	17%
Faster turnaround, improved response	8%	8%	7%	24%
Increased profits, better performance	12%	8%	3%	3%

Consistent with past AIIM surveys, when it comes to making the final decision about an electronic records management solution, RM staff are often “influencers” rather than “deciders.”

Who in your organization has THE MOST IMPORTANT role in determining whether or not to implement an electronic records management solution? (Select one.)			
Legal		99	13%
Information Technology		187	24%
Tax/Audit		9	1%
Records Management		178	23%
Operations/Administration		141	18%
Compliance/Risk		60	8%
Line of Business		74	9%
Finance		35	4%
Total		783	100%

The intersection between Legal, IT, and RM is clearly critical to development of an effective solution. The relatively even split between these functions when forced to choose “THE MOST IMPORTANT” can be viewed as a reflection of the importance of this intersection.

	Legal	IT	RM	Ops/Admin
101-500 employees	10%	18%	32%	24%
501-1,000 employees	13%	33%	27%	12%
1,001-5,000 employees	10%	25%	23%	17%
5,001-10,000 employees	15%	28%	25%	15%
10,001-50,000 employees	21%	27%	15%	14%
Over 50,000 employees	17%	23%	26%	4%

In thinking about a records management solution, the first priority for most organizations is getting “the basics” in order. For example, the following factors are “extremely important” in considering a records management solution:

- 85% Easing the capture, preservation and sharing of electronic information.
- 56% Easing the capture, preservation, and sharing of hardcopy information.
- 67% Providing the foundation for rapidly deploying consistent RM practices, policies, and procedures across business units.
- 67% Enhancing accountability, avoiding risks, and improving access to information for discovery and litigation support.
- 67% Reducing time and labor needed to reconstruct information in the event of disaster or loss.
- 64% Enabling compliance through RM best practices.
- 57% Controlling email.

In terms of matching these priorities to budget allocations, end users are very consistent. For example, 42% of end users say they have “already allocated” budget to address the priority of “easing the capture, preservation and sharing of electronic information,” and another 28% have budget allocated in the next budget cycle. The 70% who have already allocated budget or have it planned for the next cycle for easing the capture, preservation and sharing of electronic information was the highest of all the challenges under consideration by end users.


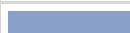


RM Outsource Opportunities Exist, Especially as RM Requirements Grow More Complex

As organizations struggle with the complexity of records management requirements, they are increasingly realize that an outsourced solution is at least something that should be considered. Among those surveyed, 30% indicate that they would be “likely” or “very likely” to consider an outsourced RM solution.

This 30% that would consider an outsourced RM is likely higher than it might have been as recently as five years ago. The reason for the shift is the increasing risks of “doing it wrong,” and the increasing complexity of “doing it right.” This combination in other IT areas often represents an ideal opening for an outsourced solution. The percentage that would consider an outsourced solution—as well as the percentage that would “never” consider an outsourced solution—is consistent across organization size. There is some variation across major vertical industries in terms of their willingness to consider an outsourced solution.









	% “very likely” or “likely” to consider an outsourced RM solution	% that would “never” consider an outsourced RM solution
State and local government	32%	15%
Financial services	33%	12%
Manufacturing and engineering	34%	16%
Utilities, oil, and gas	19%	17%

In considering an outsourced solution, the MOST important consideration is accessing the information (69% ranking “extremely important”), followed by mitigating compliance risks (56%) and cost reduction (48%). There is a great deal of variation in these results by organization size. For example, mitigating compliance risks” was significantly more important for the larger organizations in the sample, while mid-sized organizations place a higher premium on information access.

In thinking about an electronic records management solution for your organization, how likely overall would you be to consider an outsourced solution?			
Very likely		90	11%
Likely		152	19%
Not likely		442	56%
Never		110	14%
Total		794	100%

Security (84%), lack of control and flexibility (71%) and concern about communications with the outsource partner (61%) are the top three obstacles that end-users see in implementing an outsourced RM solution.

What are (or would be) the primary obstacles in your organization to implementing an outsourced electronic records management solution? (Select all those that apply.)

Concern about communication effectiveness between organization and outsource partner.		463	61%
Uncertainty about how to measure performance.		261	34%
Concern about security issues.		639	84%
Concern about compliance issues.		427	56%
Lack of internal experience in managing outsourced relationships.		237	31%
Opposition from the IT department.		230	30%
Opposition from the records management staff.		215	28%
Lack of control and flexibility.		545	71%

There is a good deal of overlap in terms of the perceived obstacles across vertical industries. In general, manufacturing and state and local government end users are less concerned about the compliance issues associated with an outsourced relationship. Manufacturing end users worry about having sufficient internal experience to effectively manage an outsourced relationship. And utilities voice relatively larger concerns than their peers about potential opposition from their RM staffs.

	Manuf	Util	Finance	S&L Govt
Concern about communication effectiveness between organization and outsource partner	69%	57%	61%	62%
Uncertainty about how to measure performance	35%	28%	32%	35%
Concern about security issues	81%	88%	83%	84%
Concern about compliance issues	58%	65%	71%	54%
Lack of internal experience in managing outsourced relationships	42%	30%	22%	30%
Opposition from the IT department	29%	37%	32%	35%
Opposition from the records management staff	27%	43%	28%	30%
Lack of control and flexibility	75%	73%	78%	77%

It is interesting that those who describe themselves as “document management specialists” see the great likelihood of internal opposition from IT (36%) and the RM staff (34%) as a potential obstacle to an outsourcing relationship. IT executives have a relatively high opinion of their ability to overcome internal opposition to outsourcing, with only 23% citing this as a potential obstacle.

68% of those responding do believe that there are certain types of documents that would NEVER be okay to outsource. The 385 comments made to this question provide insight into the concerns that end users have with particular types of documents. Some of the areas mentioned frequently in the comments were:

- 1) proprietary or trade secret information;
- 2) personnel and human resource information;
- 3) medical records;
- 4) confidential information;
- and 5) financial information.

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Appendix
Breakout of Data by Organization Size

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to PAPER-BASED information: Classification of information as records

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	819	140	110	102	174	80	139	72
1 YES	605 73.9%	87 62.1%	86 78.2%	80 78.4%	130 74.7%	56 70.0%	106 76.3%	58 80.6%
2 NO	176 21.5%	47 33.6%	22 20.0%	18 17.6%	39 22.4%	19 23.8%	21 15.1%	10 13.9%
3 Not sure	38 4.6%	6 4.3%	2 1.8%	4 3.9%	5 2.9%	5 6.3%	12 8.6%	4 5.6%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to PAPER-BASED information: Information Security

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	817	140	109	101	174	80	139	72
1 YES	637 78.0%	80 57.1%	85 78.0%	84 83.2%	138 79.3%	63 78.8%	116 83.5%	69 95.8%
2 NO	119 14.6%	46 32.9%	18 16.5%	9 8.9%	23 13.2%	10 12.5%	11 7.9%	2 2.8%
3 Not sure	61 7.5%	14 10.0%	6 5.5%	8 7.9%	13 7.5%	7 8.8%	12 8.6%	1 1.4%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to PAPER-BASED information: Data Privacy

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	814	140	108	101	173	79	139	72
1 YES	616 75.7%	85 60.7%	80 74.1%	79 78.2%	131 75.7%	62 78.5%	111 79.9%	66 91.7%
2 NO	118 14.5%	45 32.1%	16 14.8%	9 8.9%	21 12.1%	11 13.9%	12 8.6%	4 5.6%
3 Not sure	80 9.8%	10 7.1%	12 11.1%	13 12.9%	21 12.1%	6 7.6%	16 11.5%	2 2.8%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to PAPER-BASED information: Disaster Recovery/Business Continuation

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	817	140	110	101	174	80	139	71
1 YES	557 68.2%	77 55.0%	65 59.1%	67 66.3%	119 68.4%	58 72.5%	106 76.3%	63 88.7%
2 NO	185 22.6%	49 35.0%	35 31.8%	25 24.8%	39 22.4%	14 17.5%	20 14.4%	3 4.2%
3 Not sure	75 9.2%	14 10.0%	10 9.1%	9 8.9%	16 9.2%	8 10.0%	13 9.4%	5 7.0%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to PAPER-BASED information: Database Management

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	810	140	110	102	169	78	137	72
1 YES	518 64.0%	78 55.7%	67 60.9%	75 73.5%	102 60.4%	53 67.9%	89 65.0%	52 72.2%
2 NO	176 21.7%	46 32.9%	30 27.3%	12 11.8%	42 24.9%	13 16.7%	27 19.7%	6 8.3%
3 Not sure	116 14.3%	16 11.4%	13 11.8%	15 14.7%	25 14.8%	12 15.4%	21 15.3%	14 19.4%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to PAPER-BASED information: Risk management

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	809	139	107	102	174	77	136	72
1 YES	470 58.1%	44 31.7%	51 47.7%	63 61.8%	108 62.1%	49 63.6%	91 66.9%	62 86.1%
2 NO	199 24.6%	70 50.4%	38 35.5%	20 19.6%	36 20.7%	11 14.3%	20 14.7%	4 5.6%
3 Not sure	140 17.3%	25 18.0%	18 16.8%	19 18.6%	30 17.2%	17 22.1%	25 18.4%	6 8.3%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to PAPER-BASED information: Litigation Readiness

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		808	137	108	102	174	79	136
1 YES	355 43.9%	36 26.3%	42 38.9%	41 40.2%	74 42.5%	37 46.8%	78 57.4%	45 64.3%
2 NO	251 31.1%	74 54.0%	40 37.0%	23 22.5%	59 33.9%	19 24.1%	26 19.1%	10 14.3%
3 Not sure	202 25.0%	27 19.7%	26 24.1%	38 37.3%	41 23.6%	23 29.1%	32 23.5%	15 21.4%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to PAPER-BASED information: Regulatory Compliance

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		814	139	109	101	172	80	139
1 YES	560 68.8%	69 49.6%	65 59.6%	71 70.3%	120 69.8%	59 73.8%	109 78.4%	65 90.3%
2 NO	150 18.4%	48 34.5%	27 24.8%	13 12.9%	34 19.8%	10 12.5%	14 10.1%	4 5.6%
3 Not sure	104 12.8%	22 15.8%	17 15.6%	17 16.8%	18 10.5%	11 13.8%	16 11.5%	3 4.2%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to ELECTRONIC information: Classification of information as records

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		817	140	111	101	174	80	138
1 YES	466 57.0%	82 58.6%	68 61.3%	58 57.4%	98 56.3%	38 47.5%	77 55.8%	43 60.6%
2 NO	303 37.1%	49 35.0%	38 34.2%	37 36.6%	73 42.0%	34 42.5%	51 37.0%	21 29.6%
3 Not sure	48 5.9%	9 6.4%	5 4.5%	6 5.9%	3 1.7%	8 10.0%	10 7.2%	7 9.9%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to ELECTRONIC information: Information Security

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	817	140	111	102	174	80	138	70
1 YES	686 84.0%	89 63.6%	94 84.7%	88 86.3%	150 86.2%	68 85.0%	126 91.3%	69 98.6%
2 NO	88 10.8%	41 29.3%	11 9.9%	10 9.8%	15 8.6%	4 5.0%	6 4.3%	1 1.4%
3 Not sure	43 5.3%	10 7.1%	6 5.4%	4 3.9%	9 5.2%	8 10.0%	6 4.3%	0 0.0%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to ELECTRONIC information: Data Privacy

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	816	139	111	102	173	79	138	72
1 YES	624 76.5%	85 61.2%	80 72.1%	81 79.4%	132 76.3%	64 81.0%	112 81.2%	68 94.4%
2 NO	123 15.1%	43 30.9%	19 17.1%	12 11.8%	24 13.9%	7 8.9%	18 13.0%	0 0.0%
3 Not sure	69 8.5%	11 7.9%	12 10.8%	9 8.8%	17 9.8%	8 10.1%	8 5.8%	4 5.6%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to ELECTRONIC information: Disaster Recovery/Business Continuation

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	817	140	111	101	174	80	138	71
1 YES	631 77.2%	94 67.1%	72 64.9%	81 80.2%	138 79.3%	64 80.0%	115 83.3%	65 91.5%
2 NO	120 14.7%	35 25.0%	27 24.3%	13 12.9%	25 14.4%	7 8.8%	12 8.7%	1 1.4%
3 Not sure	66 8.1%	11 7.9%	12 10.8%	7 6.9%	11 6.3%	9 11.3%	11 8.0%	5 7.0%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to ELECTRONIC information: Database Management

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	809	138	111	99	174	79	136	70
1 YES	573 70.8%	84 60.9%	84 75.7%	74 74.7%	120 69.0%	54 68.4%	99 72.8%	56 80.0%
2 NO	133 16.4%	39 28.3%	19 17.1%	11 11.1%	31 17.8%	11 13.9%	19 14.0%	3 4.3%
3 Not sure	103 12.7%	15 10.9%	8 7.2%	14 14.1%	23 13.2%	14 17.7%	18 13.2%	11 15.7%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to ELECTRONIC information: Risk management

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	806	139	110	100	172	79	134	70
1 YES	424 52.6%	52 37.4%	49 44.5%	55 55.0%	91 52.9%	40 50.6%	82 61.2%	54 77.1%
2 NO	217 26.9%	61 43.9%	39 35.5%	25 25.0%	48 27.9%	16 20.3%	24 17.9%	3 4.3%
3 Not sure	165 20.5%	26 18.7%	22 20.0%	20 20.0%	33 19.2%	23 29.1%	28 20.9%	13 18.6%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to ELECTRONIC information: Litigation Readiness

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	807	140	110	100	169	80	136	70
1 YES	292 36.2%	40 28.6%	30 27.3%	34 34.0%	62 36.7%	26 32.5%	58 42.6%	40 57.1%
2 NO	309 38.3%	80 57.1%	47 42.7%	29 29.0%	72 42.6%	25 31.3%	45 33.1%	11 15.7%
3 Not sure	206 25.5%	20 14.3%	33 30.0%	37 37.0%	35 20.7%	29 36.3%	33 24.3%	19 27.1%

Please indicate if your organization has formal programs (in other words, specific programs that include designated employees, policies, procedures, and information technology) that address the following topics relative to ELECTRONIC information: Regulatory Compliance

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	811	140	110	101	172	79	137	70
1 YES	463 57.1%	65 46.4%	53 48.2%	53 52.5%	98 57.0%	45 57.0%	86 62.8%	61 87.1%
2 NO	213 26.3%	57 40.7%	36 32.7%	25 24.8%	48 27.9%	18 22.8%	25 18.2%	4 5.7%
3 Not sure	135 16.6%	18 12.9%	21 19.1%	23 22.8%	26 15.1%	16 20.3%	26 19.0%	5 7.1%

Indicate if your organization has specific policies or procedures that address the following issues. (Check all that apply.)								
	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	789	130	108	99	166	75	137	72
Ownership of records and information, i.e., who owns the information created and received by an organization.	547 69.3%	90 69.2%	75 69.4%	74 74.7%	108 65.1%	53 70.7%	92 67.2%	53 73.6%
Employee privacy at work, i.e., the employer's right to monitor and review employee email.	611 77.4%	73 56.2%	73 67.6%	78 78.8%	132 79.5%	66 88.0%	122 89.1%	65 90.3%
Records retention and/or classification	620 78.6%	81 62.3%	85 78.7%	82 82.8%	134 80.7%	59 78.7%	113 82.5%	64 88.9%
Email usage: e.g., business vs. non-business communications, storage, purge, archival	563 71.4%	77 59.2%	73 67.6%	72 72.7%	120 72.3%	57 76.0%	104 75.9%	58 80.6%
Classification or coding of information, i.e., as confidential, vital, or trade secrets.	389 49.3%	59 45.4%	51 47.2%	43 43.4%	69 41.6%	39 52.0%	75 54.7%	51 70.8%
Transmission of confidential or trade secret information.	414 52.5%	61 46.9%	44 40.7%	48 48.5%	82 49.4%	43 57.3%	80 58.4%	54 75.0%
The applicability of your organization's information management policies to third parties, such as contractors.	410 52.0%	51 39.2%	49 45.4%	42 42.4%	88 53.0%	46 61.3%	80 58.4%	52 72.2%
The applicability of your organization's records management policies to third parties, such as contractors.	346 43.9%	46 35.4%	45 41.7%	40 40.4%	67 40.4%	38 50.7%	65 47.4%	43 59.7%
Rules for telecommuters, mobile workers, and "road warriors" using notebook computers and other devices outside the office.	392 49.7%	51 39.2%	43 39.8%	47 47.5%	83 50.0%	36 48.0%	83 60.6%	48 66.7%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: A lawsuit or other court action

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		816	139	111	101	173	80	138
1 YES	116 14.2%	7 5.0%	14 12.6%	5 5.0%	29 16.8%	16 20.0%	27 19.6%	18 25.0%
2 NO	586 71.8%	124 89.2%	87 78.4%	82 81.2%	123 71.1%	50 62.5%	77 55.8%	41 56.9%
3 Not sure	114 14.0%	8 5.8%	10 9.0%	14 13.9%	21 12.1%	14 17.5%	34 24.6%	13 18.1%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: A regulatory action or penalty

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		813	136	111	101	173	80	138
1 YES	127 15.6%	9 6.6%	13 11.7%	11 10.9%	30 17.3%	17 21.3%	28 20.3%	19 26.4%
2 NO	576 70.8%	121 89.0%	88 79.3%	81 80.2%	119 68.8%	50 62.5%	77 55.8%	38 52.8%
3 Not sure	110 13.5%	6 4.4%	10 9.0%	9 8.9%	24 13.9%	13 16.3%	33 23.9%	15 20.8%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: Destruction of information needed for a lawsuit, audit or investigation

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		812	138	111	99	173	79	138
1 YES	62 7.6%	3 2.2%	10 9.0%	1 1.0%	19 11.0%	7 8.9%	14 10.1%	8 11.1%
2 NO	625 77.0%	126 91.3%	88 79.3%	85 85.9%	136 78.6%	56 70.9%	86 62.3%	46 63.9%
3 Not sure	125 15.4%	9 6.5%	13 11.7%	13 13.1%	18 10.4%	16 20.3%	38 27.5%	18 25.0%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: The inability to find or access information needed for a lawsuit, audit, or investigation

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		813	138	110	102	172	80	137
1 YES	178 21.9%	20 14.5%	24 21.8%	12 11.8%	46 26.7%	22 27.5%	30 21.9%	24 33.3%
2 NO	524 64.5%	109 79.0%	75 68.2%	76 74.5%	105 61.0%	47 58.8%	74 54.0%	36 50.0%
3 Not sure	111 13.7%	9 6.5%	11 10.0%	14 13.7%	21 12.2%	11 13.8%	33 24.1%	12 16.7%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: Theft of information

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		812	137	111	101	171	80	138
1 YES	84 10.3%	5 3.6%	11 9.9%	8 7.9%	19 11.1%	10 12.5%	17 12.3%	13 18.1%
2 NO	598 73.6%	122 89.1%	88 79.3%	80 79.2%	128 74.9%	55 68.8%	82 59.4%	42 58.3%
3 Not sure	130 16.0%	10 7.3%	12 10.8%	13 12.9%	24 14.0%	15 18.8%	39 28.3%	17 23.6%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: A privacy failure

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		810	137	110	102	171	78	138
1 YES	84 10.4%	9 6.6%	11 10.0%	6 5.9%	21 12.3%	12 15.4%	14 10.1%	10 13.9%
2 NO	594 73.3%	121 88.3%	89 80.9%	81 79.4%	123 71.9%	51 65.4%	83 60.1%	45 62.5%
3 Not sure	132 16.3%	7 5.1%	10 9.1%	15 14.7%	27 15.8%	15 19.2%	41 29.7%	17 23.6%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: A security breach

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		803	136	110	101	170	76	138
1 YES	101 12.6%	6 4.4%	11 10.0%	10 9.9%	24 14.1%	13 17.1%	17 12.3%	19 27.1%
2 NO	567 70.6%	117 86.0%	89 80.9%	77 76.2%	117 68.8%	51 67.1%	79 57.2%	36 51.4%
3 Not sure	135 16.8%	13 9.6%	10 9.1%	14 13.9%	29 17.1%	12 15.8%	42 30.4%	15 21.4%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: Issues discovered through auditing and/or monitoring of internal compliance with your own information management program

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		805	133	110	101	171	80	137
1 YES	315 39.1%	36 27.1%	46 41.8%	34 33.7%	72 42.1%	32 40.0%	59 43.1%	35 49.3%
2 NO	382 47.5%	85 63.9%	53 48.2%	56 55.4%	80 46.8%	36 45.0%	48 35.0%	23 32.4%
3 Not sure	108 13.4%	12 9.0%	11 10.0%	11 10.9%	19 11.1%	12 15.0%	30 21.9%	13 18.3%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: Sarbanes-Oxley Act (US)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		797	131	110	99	168	79	137
1 YES	215 27.0%	17 13.0%	15 13.6%	14 14.1%	47 28.0%	29 36.7%	58 42.3%	34 47.9%
2 NO	470 59.0%	97 74.0%	85 77.3%	73 73.7%	100 59.5%	37 46.8%	53 38.7%	24 33.8%
3 Not sure	112 14.1%	17 13.0%	10 9.1%	12 12.1%	21 12.5%	13 16.5%	26 19.0%	13 18.3%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: California Database Protection Act—1386 (US)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	783	130	109	96	162	79	134	71
1 YES	21 2.7%	1 0.8%	1 0.9%	0 0.0%	4 2.5%	1 1.3%	8 6.0%	6 8.5%
2 NO	572 73.1%	108 83.1%	96 88.1%	77 80.2%	122 75.3%	52 65.8%	75 56.0%	40 56.3%
3 Not sure	190 24.3%	21 16.2%	12 11.0%	19 19.8%	36 22.2%	26 32.9%	51 38.1%	25 35.2%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: SEC 17 a-4 (US)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	782	131	107	96	160	78	137	71
1 YES	32 4.1%	3 2.3%	0 0.0%	2 2.1%	7 4.4%	0 0.0%	11 8.0%	9 12.7%
2 NO	529 67.6%	107 81.7%	89 83.2%	69 71.9%	111 69.4%	50 64.1%	68 49.6%	33 46.5%
3 Not sure	221 28.3%	21 16.0%	18 16.8%	25 26.0%	42 26.3%	28 35.9%	58 42.3%	29 40.8%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: FDA Part II/21 CFR Part II (US)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	775	128	106	96	161	77	134	71
1 YES	44 5.7%	4 3.1%	1 0.9%	5 5.2%	14 8.7%	3 3.9%	8 6.0%	9 12.7%
2 NO	529 68.3%	105 82.0%	89 84.0%	68 70.8%	108 67.1%	47 61.0%	73 54.5%	37 52.1%
3 Not sure	202 26.1%	19 14.8%	16 15.1%	23 24.0%	39 24.2%	27 35.1%	53 39.6%	25 35.2%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: Health Information Portability and Accountability Act—HIPAA (US)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		785	130	109	97	160	80	136
1 YES	176 22.4%	21 16.2%	21 19.3%	23 23.7%	33 20.6%	19 23.8%	39 28.7%	20 28.2%
2 NO	472 60.1%	97 74.6%	82 75.2%	56 57.7%	101 63.1%	40 50.0%	59 43.4%	35 49.3%
3 Not sure	137 17.5%	12 9.2%	6 5.5%	18 18.6%	26 16.3%	21 26.3%	38 27.9%	16 22.5%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: Gramm-Leach-Bliley Act (US)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		777	128	109	96	162	79	131
1 YES	45 5.8%	5 3.9%	4 3.7%	2 2.1%	8 4.9%	7 8.9%	10 7.6%	9 12.9%
2 NO	524 67.4%	103 80.5%	89 81.7%	67 69.8%	116 71.6%	45 57.0%	69 52.7%	33 47.1%
3 Not sure	208 26.8%	20 15.6%	16 14.7%	27 28.1%	38 23.5%	27 34.2%	52 39.7%	28 40.0%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: EU Data Protection Directive--Directive 95/46 (European Community)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		773	129	106	94	162	77	132
1 YES	68 8.8%	6 4.7%	4 3.8%	3 3.2%	18 11.1%	12 15.6%	14 10.6%	11 15.5%
2 NO	512 66.2%	105 81.4%	87 82.1%	73 77.7%	108 66.7%	38 49.4%	71 53.8%	28 39.4%
3 Not sure	193 25.0%	18 14.0%	15 14.2%	18 19.1%	36 22.2%	27 35.1%	47 35.6%	32 45.1%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: The Electronic Signatures in Global and National Commerce Act--E-SIGN (US)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		784	131	108	97	161	79	137
1 YES	35 4.5%	3 2.3%	4 3.7%	5 5.2%	4 2.5%	4 5.1%	7 5.1%	8 11.6%
2 NO	537 68.5%	109 83.2%	89 82.4%	70 72.2%	120 74.5%	44 55.7%	72 52.6%	31 44.9%
3 Not sure	212 27.0%	19 14.5%	15 13.9%	22 22.7%	37 23.0%	31 39.2%	58 42.3%	30 43.5%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: UK Public Records Office

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		790	131	109	96	166	79	136
1 YES	36 4.6%	2 1.5%	5 4.6%	3 3.1%	10 6.0%	9 11.4%	4 2.9%	3 4.2%
2 NO	574 72.7%	111 84.7%	94 86.2%	76 79.2%	128 77.1%	44 55.7%	81 59.6%	38 53.5%
3 Not sure	180 22.8%	18 13.7%	10 9.2%	17 17.7%	28 16.9%	26 32.9%	51 37.5%	30 42.3%

In the last 18 months, has your organization made changes to the way that records and information are managed as a result of the following: Basel II

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		781	130	108	95	164	77	134
1 YES	25 3.2%	3 2.3%	2 1.9%	2 2.1%	9 5.5%	3 3.9%	1 0.7%	5 7.0%
2 NO	539 69.0%	107 82.3%	87 80.6%	67 70.5%	119 72.6%	45 58.4%	75 56.0%	37 52.1%
3 Not sure	217 27.8%	20 15.4%	19 17.6%	26 27.4%	36 22.0%	29 37.7%	58 43.3%	29 40.8%

Does your organization have a formal process for ensuring that all information potentially relevant to pending or current lawsuits, audits, and/or investigations is preserved? Such processes are often called “Records Hold,” “Legal Hold,” or “Disposal Suspension.”

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		808	140	111	99	170	80	137
Yes	428 53.0%	47 33.6%	52 46.8%	54 54.5%	78 45.9%	44 55.0%	94 68.6%	58 84.1%
No	380 47.0%	93 66.4%	59 53.2%	45 45.5%	92 54.1%	36 45.0%	43 31.4%	11 15.9%

Has an executive communicated with you via an internal memo, email message, or presentation about records and information management issues in the past 18 months?

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		812	140	108	102	172	81	138
Yes	492 60.6%	68 48.6%	74 68.5%	66 64.7%	96 55.8%	53 65.4%	85 61.6%	48 69.6%
No	320 39.4%	72 51.4%	34 31.5%	36 35.3%	76 44.2%	28 34.6%	53 38.4%	21 30.4%

Is there a statement from your CEO or other high-level executive regarding the importance of records and information management that is a standard part of your employee manual, records management manual, or other policy or procedure that is provided to all employees?

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		815	140	110	102	173	78	139
Yes	387 47.5%	62 44.3%	46 41.8%	49 48.0%	74 42.8%	37 47.4%	72 51.8%	46 64.8%
No	428 52.5%	78 55.7%	64 58.2%	53 52.0%	99 57.2%	41 52.6%	67 48.2%	25 35.2%

Does your organization regularly deliver training for employees on records and information management issues?

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		817	140	111	100	172	81	139
Yes	338 41.4%	48 34.3%	43 38.7%	44 44.0%	65 37.8%	28 34.6%	68 48.9%	41 56.9%
No	479 58.6%	92 65.7%	68 61.3%	56 56.0%	107 62.2%	53 65.4%	71 51.1%	31 43.1%

AGREE or DISAGREE? My organization takes records and information management issues seriously.								
	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	818	140	110	102	173	81	138	72
1 Strongly agree	268 32.8%	59 42.1%	31 28.2%	31 30.4%	41 23.7%	25 30.9%	45 32.6%	36 50.0%
2 Somewhat agree	342 41.8%	45 32.1%	51 46.4%	43 42.2%	83 48.0%	38 46.9%	57 41.3%	24 33.3%
3 Somewhat disagree	139 17.0%	23 16.4%	20 18.2%	23 22.5%	29 16.8%	10 12.3%	24 17.4%	10 13.9%
4 Strongly disagree	67 8.2%	11 7.9%	8 7.3%	5 4.9%	20 11.6%	8 9.9%	12 8.7%	2 2.8%
N/A	2 0.2%	2 1.4%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%

AGREE or DISAGREE? I clearly understand my records and information management obligations and how to fulfill them.								
	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	819	140	111	102	173	81	138	72
1 Strongly agree	426 52.0%	62 44.3%	53 47.7%	52 51.0%	87 50.3%	38 46.9%	87 63.0%	47 65.3%
2 Somewhat agree	243 29.7%	34 24.3%	40 36.0%	35 34.3%	57 32.9%	27 33.3%	33 23.9%	16 22.2%
3 Somewhat disagree	106 12.9%	29 20.7%	14 12.6%	13 12.7%	23 13.3%	11 13.6%	8 5.8%	7 9.7%
4 Strongly disagree	38 4.6%	11 7.9%	4 3.6%	2 2.0%	6 3.5%	5 6.2%	9 6.5%	1 1.4%
N/A	6 0.7%	4 2.9%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 0.7%	1 1.4%

AGREE or DISAGREE? I am given adequate time on a daily basis to fulfill my records and information management responsibilities, e.g., for duties such as properly coding files and electronic records.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		818	140	111	102	173	80	138
1 Strongly agree	192 23.5%	24 17.1%	28 25.2%	23 22.5%	36 20.8%	19 23.8%	43 31.2%	19 26.4%
2 Somewhat agree	259 31.7%	57 40.7%	35 31.5%	39 38.2%	51 29.5%	18 22.5%	37 26.8%	22 30.6%
3 Somewhat disagree	202 24.7%	30 21.4%	32 28.8%	15 14.7%	51 29.5%	23 28.8%	28 20.3%	21 29.2%
4 Strongly disagree	122 14.9%	16 11.4%	14 12.6%	19 18.6%	26 15.0%	16 20.0%	23 16.7%	8 11.1%
N/A	43 5.3%	13 9.3%	2 1.8%	6 5.9%	9 5.2%	4 5.0%	7 5.1%	2 2.8%

AGREE or DISAGREE? I am aware of a past incident(s) where an employee in my organization was disciplined for failing to adhere to records and information management directives (including retention directives, acceptable use of the email system and Internet policies, etc.)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		811	138	111	102	171	80	135
1 Strongly agree	94 11.6%	12 8.7%	12 10.8%	9 8.8%	14 8.2%	11 13.8%	21 15.6%	15 20.8%
2 Somewhat agree	124 15.3%	21 15.2%	18 16.2%	13 12.7%	21 12.3%	17 21.3%	19 14.1%	15 20.8%
3 Somewhat disagree	139 17.1%	15 10.9%	18 16.2%	14 13.7%	44 25.7%	13 16.3%	22 16.3%	12 16.7%
4 Strongly disagree	300 37.0%	50 36.2%	42 37.8%	43 42.2%	69 40.4%	25 31.3%	50 37.0%	21 29.2%
N/A	154 19.0%	40 29.0%	21 18.9%	23 22.5%	23 13.5%	14 17.5%	23 17.0%	9 12.5%

AGREE or DISAGREE? My organization's records and information management directives are consistently enforced.								
	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	810	138	111	102	171	79	137	70
1 Strongly agree	83 10.2%	23 16.7%	8 7.2%	7 6.9%	10 5.8%	6 7.6%	22 16.1%	7 10.0%
2 Somewhat agree	235 29.0%	46 33.3%	31 27.9%	38 37.3%	42 24.6%	19 24.1%	34 24.8%	24 34.3%
3 Somewhat disagree	248 30.6%	34 24.6%	37 33.3%	27 26.5%	62 36.3%	29 36.7%	34 24.8%	24 34.3%
4 Strongly disagree	200 24.7%	20 14.5%	31 27.9%	26 25.5%	52 30.4%	21 26.6%	38 27.7%	12 17.1%
N/A	44 5.4%	15 10.9%	4 3.6%	4 3.9%	5 2.9%	4 5.1%	9 6.6%	3 4.3%

AGREE or DISAGREE? I understand how I can get my questions about our records and information management program answered.								
	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	809	139	110	102	170	78	136	72
1 Strongly agree	297 36.7%	46 33.1%	41 37.3%	36 35.3%	59 34.7%	25 32.1%	62 45.6%	28 38.9%
2 Somewhat agree	262 32.4%	44 31.7%	37 33.6%	37 36.3%	57 33.5%	19 24.4%	37 27.2%	29 40.3%
3 Somewhat disagree	130 16.1%	28 20.1%	20 18.2%	11 10.8%	27 15.9%	19 24.4%	16 11.8%	9 12.5%
4 Strongly disagree	94 11.6%	11 7.9%	9 8.2%	14 13.7%	23 13.5%	14 17.9%	18 13.2%	5 6.9%
N/A	26 3.2%	10 7.2%	3 2.7%	4 3.9%	4 2.4%	1 1.3%	3 2.2%	1 1.4%

IMPORTANT or NOT IMPORTANT?

How important are each of the following in thinking about an electronic records management solution? Easing the capture, preservation, and sharing of electronic information.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	815	139	110	102	171	81	138	72
1 Extremely important	695 85.3%	110 79.1%	96 87.3%	85 83.3%	149 87.1%	71 87.7%	113 81.9%	69 95.8%
2 Somewhat important	102 12.5%	25 18.0%	10 9.1%	14 13.7%	19 11.1%	10 12.3%	21 15.2%	3 4.2%
3 Not important at all	11 1.3%	1 0.7%	3 2.7%	1 1.0%	3 1.8%	0 0.0%	3 2.2%	0 0.0%
N/A	7 0.9%	3 2.2%	1 0.9%	2 2.0%	0 0.0%	0 0.0%	1 0.7%	0 0.0%

IMPORTANT or NOT IMPORTANT?

How important are each of the following in thinking about an electronic records management solution? Easing the capture, preservation, and sharing of hardcopy information.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	812	139	109	102	170	81	137	72
1 Extremely important	456 56.2%	69 49.6%	68 62.4%	59 57.8%	103 60.6%	44 54.3%	70 51.1%	41 56.9%
2 Somewhat important	310 38.2%	57 41.0%	36 33.0%	38 37.3%	59 34.7%	34 42.0%	58 42.3%	28 38.9%
3 Not important at all	39 4.8%	10 7.2%	4 3.7%	3 2.9%	8 4.7%	3 3.7%	8 5.8%	3 4.2%
N/A	7 0.9%	3 2.2%	1 0.9%	2 2.0%	0 0.0%	0 0.0%	1 0.7%	0 0.0%

IMPORTANT or NOT IMPORTANT?

How important are each of the following in thinking about an electronic records management solution? Providing the foundation for rapidly deploying consistent RM practices, policies, and procedures across enterprise business units.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	811	135	110	102	171	81	138	72
1 Extremely important	540 66.6%	70 51.9%	66 60.0%	68 66.7%	128 74.9%	63 77.8%	92 66.7%	52 72.2%
2 Somewhat important	226 27.9%	49 36.3%	38 34.5%	29 28.4%	37 21.6%	14 17.3%	40 29.0%	18 25.0%
3 Not important at all	30 3.7%	8 5.9%	4 3.6%	3 2.9%	5 2.9%	4 4.9%	5 3.6%	1 1.4%
N/A	15 1.8%	8 5.9%	2 1.8%	2 2.0%	1 0.6%	0 0.0%	1 0.7%	1 1.4%

IMPORTANT or NOT IMPORTANT?

How important are each of the following in thinking about an electronic records management solution? Enhancing accountability, avoiding risks, and improving access to information for discovery and litigation support.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		809	137	110	102	170	80	137
1 Extremely important	544 67.2%	68 49.6%	69 62.7%	62 60.8%	123 72.4%	62 77.5%	101 73.7%	57 80.3%
2 Somewhat important	218 26.9%	52 38.0%	35 31.8%	31 30.4%	42 24.7%	15 18.8%	29 21.2%	14 19.7%
3 Not important at all	31 3.8%	9 6.6%	2 1.8%	7 6.9%	4 2.4%	3 3.8%	6 4.4%	0 0.0%
N/A	16 2.0%	8 5.8%	4 3.6%	2 2.0%	1 0.6%	0 0.0%	1 0.7%	0 0.0%

IMPORTANT or NOT IMPORTANT?

How important are each of the following in thinking about an electronic records management solution? Reducing time and labor needed to reconstruct information in the event of disaster or loss.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		809	137	110	102	171	78	137
1 Extremely important	538 66.5%	83 60.6%	75 68.2%	70 68.6%	120 70.2%	50 64.1%	86 62.8%	52 72.2%
2 Somewhat important	229 28.3%	42 30.7%	29 26.4%	25 24.5%	44 25.7%	26 33.3%	43 31.4%	20 27.8%
3 Not important at all	30 3.7%	8 5.8%	4 3.6%	4 3.9%	5 2.9%	2 2.6%	7 5.1%	0 0.0%
N/A	12 1.5%	4 2.9%	2 1.8%	3 2.9%	2 1.2%	0 0.0%	1 0.7%	0 0.0%

IMPORTANT or NOT IMPORTANT?

How important are each of the following in thinking about an electronic records management solution? Enabling compliance through RM best practices.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		808	137	110	100	171	79	137
1 Extremely important	516 63.9%	75 54.7%	70 63.6%	67 67.0%	111 64.9%	55 69.6%	90 65.7%	47 65.3%
2 Somewhat important	239 29.6%	44 32.1%	32 29.1%	26 26.0%	51 29.8%	19 24.1%	41 29.9%	25 34.7%
3 Not important at all	39 4.8%	14 10.2%	4 3.6%	5 5.0%	7 4.1%	5 6.3%	4 2.9%	0 0.0%
N/A	14 1.7%	4 2.9%	4 3.6%	2 2.0%	2 1.2%	0 0.0%	2 1.5%	0 0.0%

IMPORTANT or NOT IMPORTANT?

How important are each of the following in thinking about an electronic records management solution? Controlling email.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		808	137	109	101	170	80	138
1 Extremely important	461 57.1%	62 45.3%	64 58.7%	55 54.5%	107 62.9%	46 57.5%	86 62.3%	40 56.3%
2 Somewhat important	274 33.9%	55 40.1%	35 32.1%	35 34.7%	53 31.2%	27 33.8%	42 30.4%	26 36.6%
3 Not important at all	60 7.4%	16 11.7%	9 8.3%	7 6.9%	9 5.3%	6 7.5%	9 6.5%	4 5.6%
N/A	13 1.6%	4 2.9%	1 0.9%	4 4.0%	1 0.6%	1 1.3%	1 0.7%	1 1.4%

Has budget been allocated within your organization to address each of the following concerns? Easing the capture, preservation, and sharing of electronic information.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		798	133	109	100	171	78	135
1 Already allocated	339 42.5%	49 36.8%	49 45.0%	48 48.0%	74 43.3%	29 37.2%	60 44.4%	30 42.3%
2 Allocated in next budget cycle	223 27.9%	35 26.3%	36 33.0%	28 28.0%	48 28.1%	23 29.5%	29 21.5%	24 33.8%
3 No spending planned	236 29.6%	49 36.8%	24 22.0%	24 24.0%	49 28.7%	26 33.3%	46 34.1%	17 23.9%

Has budget been allocated within your organization to address each of the following concerns? Easing the capture, preservation, and sharing of hardcopy information.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		796	133	108	100	170	78	135
1 Already allocated	297 37.3%	38 28.6%	46 42.6%	44 44.0%	60 35.3%	25 32.1%	53 39.3%	31 43.7%
2 Allocated in next budget cycle	179 22.5%	29 21.8%	28 25.9%	21 21.0%	35 20.6%	25 32.1%	21 15.6%	19 26.8%
3 No spending planned	320 40.2%	66 49.6%	34 31.5%	35 35.0%	75 44.1%	28 35.9%	61 45.2%	21 29.6%

Has budget been allocated within your organization to address each of the following concerns? Providing the foundation for rapidly deploying consistent RM practices, policies, and procedures across enterprise business units.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		790	133	107	99	170	74	135
1 Already allocated	230 29.1%	29 21.8%	36 33.6%	31 31.3%	43 25.3%	22 29.7%	40 29.6%	29 40.8%
2 Allocated in next budget cycle	224 28.4%	27 20.3%	37 34.6%	32 32.3%	51 30.0%	25 33.8%	30 22.2%	22 31.0%
3 No spending planned	336 42.5%	77 57.9%	34 31.8%	36 36.4%	76 44.7%	27 36.5%	65 48.1%	20 28.2%

Has budget been allocated within your organization to address each of the following concerns? Enhancing accountability, avoiding risks, and improving access to information for discovery and litigation support.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		780	127	106	99	169	76	132
1 Already allocated	205 26.3%	26 20.5%	23 21.7%	27 27.3%	36 21.3%	21 27.6%	44 33.3%	28 40.0%
2 Allocated in next budget cycle	212 27.2%	25 19.7%	35 33.0%	29 29.3%	47 27.8%	23 30.3%	27 20.5%	25 35.7%
3 No spending planned	363 46.5%	76 59.8%	48 45.3%	43 43.4%	86 50.9%	32 42.1%	61 46.2%	17 24.3%

Has budget been allocated within your organization to address each of the following concerns? Reducing time and labor needed to reconstruct information in the event of disaster or loss.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		786	132	107	98	170	75	134
1 Already allocated	232 29.5%	38 28.8%	25 23.4%	33 33.7%	46 27.1%	24 32.0%	42 31.3%	24 34.8%
2 Allocated in next budget cycle	200 25.4%	26 19.7%	30 28.0%	26 26.5%	52 30.6%	14 18.7%	29 21.6%	23 33.3%
3 No spending planned	354 45.0%	68 51.5%	52 48.6%	39 39.8%	72 42.4%	37 49.3%	63 47.0%	22 31.9%

Has budget been allocated within your organization to address each of the following concerns? Enabling compliance through RM best practices.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		780	131	108	95	169	76	131
1 Already allocated	220 28.2%	32 24.4%	31 28.7%	29 30.5%	44 26.0%	21 27.6%	40 30.5%	23 33.3%
2 Allocated in next budget cycle	217 27.8%	29 22.1%	35 32.4%	27 28.4%	48 28.4%	25 32.9%	28 21.4%	24 34.8%
3 No spending planned	343 44.0%	70 53.4%	42 38.9%	39 41.1%	77 45.6%	30 39.5%	63 48.1%	22 31.9%

Has budget been allocated within your organization to address each of the following concerns? Controlling email.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		782	130	108	98	167	75	133
1 Already allocated	245 31.3%	34 26.2%	33 30.6%	33 33.7%	40 24.0%	22 29.3%	62 46.6%	21 30.0%
2 Allocated in next budget cycle	210 26.9%	40 30.8%	33 30.6%	26 26.5%	43 25.7%	23 30.7%	24 18.0%	21 30.0%
3 No spending planned	327 41.8%	56 43.1%	42 38.9%	39 39.8%	84 50.3%	30 40.0%	47 35.3%	28 40.0%

In thinking about an electronic records management solution for your organization, how likely overall would you be to consider an outsourced solution?

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		794	134	108	100	169	78	133
Very likely	90 11.3%	14 10.4%	14 13.0%	10 10.0%	20 11.8%	14 17.9%	8 6.0%	10 14.3%
Likely	152 19.1%	29 21.6%	14 13.0%	23 23.0%	32 18.9%	10 12.8%	30 22.6%	14 20.0%
Not likely	442 55.7%	73 54.5%	63 58.3%	58 58.0%	93 55.0%	42 53.8%	75 56.4%	36 51.4%
Never	110 13.9%	18 13.4%	17 15.7%	9 9.0%	24 14.2%	12 15.4%	20 15.0%	10 14.3%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Legal

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		794	131	108	99	166	80	137
1 Would definitely consider	131 16.5%	19 14.5%	17 15.7%	15 15.2%	24 14.5%	13 16.3%	29 21.2%	14 19.7%
2 Might consider	254 32.0%	52 39.7%	39 36.1%	28 28.3%	53 31.9%	28 35.0%	41 29.9%	11 15.5%
3 Would never consider	245 30.9%	37 28.2%	30 27.8%	32 32.3%	61 36.7%	17 21.3%	37 27.0%	31 43.7%
Not sure	164 20.7%	23 17.6%	22 20.4%	24 24.2%	28 16.9%	22 27.5%	30 21.9%	15 21.1%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Information Technology

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		797	132	108	100	168	79	137
1 Would definitely consider	185 23.2%	29 22.0%	28 25.9%	23 23.0%	35 20.8%	18 22.8%	38 27.7%	14 19.7%
2 Might consider	330 41.4%	49 37.1%	50 46.3%	39 39.0%	69 41.1%	32 40.5%	51 37.2%	38 53.5%
3 Would never consider	178 22.3%	35 26.5%	22 20.4%	25 25.0%	40 23.8%	14 17.7%	30 21.9%	12 16.9%
Not sure	104 13.0%	19 14.4%	8 7.4%	13 13.0%	24 14.3%	15 19.0%	18 13.1%	7 9.9%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Tax/Audit

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		790	131	106	100	167	77	137
1 Would definitely consider	103 13.0%	18 13.7%	10 9.4%	16 16.0%	11 6.6%	11 14.3%	24 17.5%	13 18.6%
2 Might consider	285 36.1%	57 43.5%	43 40.6%	27 27.0%	64 38.3%	27 35.1%	44 32.1%	22 31.4%
3 Would never consider	191 24.2%	27 20.6%	22 20.8%	32 32.0%	45 26.9%	19 24.7%	30 21.9%	16 22.9%
Not sure	211 26.7%	29 22.1%	31 29.2%	25 25.0%	47 28.1%	20 26.0%	39 28.5%	19 27.1%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Records Management

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		795	133	108	98	168	79	136
1 Would definitely consider	209 26.3%	35 26.3%	31 28.7%	25 25.5%	37 22.0%	19 24.1%	40 29.4%	22 31.0%
2 Might consider	263 33.1%	41 30.8%	43 39.8%	34 34.7%	54 32.1%	27 34.2%	38 27.9%	24 33.8%
3 Would never consider	212 26.7%	34 25.6%	26 24.1%	28 28.6%	54 32.1%	16 20.3%	34 25.0%	20 28.2%
Not sure	111 14.0%	23 17.3%	8 7.4%	11 11.2%	23 13.7%	17 21.5%	24 17.6%	5 7.0%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Administration

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		790	130	107	100	167	79	134
1 Would definitely consider	121 15.3%	25 19.2%	13 12.1%	15 15.0%	16 9.6%	15 19.0%	22 16.4%	15 21.1%
2 Might consider	344 43.5%	52 40.0%	55 51.4%	41 41.0%	78 46.7%	32 40.5%	55 41.0%	29 40.8%
3 Would never consider	166 21.0%	33 25.4%	28 26.2%	23 23.0%	36 21.6%	13 16.5%	23 17.2%	10 14.1%
Not sure	159 20.1%	20 15.4%	11 10.3%	21 21.0%	37 22.2%	19 24.1%	34 25.4%	17 23.9%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Compliance/Risk Department

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		788	128	106	100	166	79	137
1 Would definitely consider	123 15.6%	19 14.8%	16 15.1%	13 13.0%	19 11.4%	16 20.3%	27 19.7%	13 18.6%
2 Might consider	271 34.4%	43 33.6%	38 35.8%	36 36.0%	62 37.3%	29 36.7%	42 30.7%	20 28.6%
3 Would never consider	210 26.6%	37 28.9%	26 24.5%	24 24.0%	51 30.7%	16 20.3%	32 23.4%	24 34.3%
Not sure	184 23.4%	29 22.7%	26 24.5%	27 27.0%	34 20.5%	18 22.8%	36 26.3%	13 18.6%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Line of Business

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		789	129	107	98	167	78	137
1 Would definitely consider	98 12.4%	14 10.9%	7 6.5%	11 11.2%	21 12.6%	11 14.1%	17 12.4%	17 23.9%
2 Might consider	316 40.1%	52 40.3%	51 47.7%	35 35.7%	67 40.1%	31 39.7%	53 38.7%	27 38.0%
3 Would never consider	184 23.3%	35 27.1%	26 24.3%	26 26.5%	39 23.4%	14 17.9%	30 21.9%	13 18.3%
Not sure	191 24.2%	28 21.7%	23 21.5%	26 26.5%	40 24.0%	22 28.2%	37 27.0%	14 19.7%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Finance

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		784	130	105	98	166	78	135
1 Would definitely consider	105 13.4%	16 12.3%	10 9.5%	14 14.3%	17 10.2%	11 14.1%	24 17.8%	13 18.3%
2 Might consider	322 41.1%	58 44.6%	51 48.6%	31 31.6%	74 44.6%	29 37.2%	48 35.6%	31 43.7%
3 Would never consider	196 25.0%	35 26.9%	26 24.8%	32 32.7%	44 26.5%	17 21.8%	29 21.5%	13 18.3%
Not sure	161 20.5%	21 16.2%	18 17.1%	21 21.4%	31 18.7%	21 26.9%	34 25.2%	14 19.7%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Executive Staff (CEO, President, COO)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		789	131	106	98	166	79	136
1 Would definitely consider	113 14.3%	24 18.3%	15 14.2%	12 12.2%	16 9.6%	15 19.0%	21 15.4%	10 14.1%
2 Might consider	306 38.8%	50 38.2%	42 39.6%	38 38.8%	77 46.4%	23 29.1%	49 36.0%	26 36.6%
3 Would never consider	202 25.6%	35 26.7%	30 28.3%	28 28.6%	41 24.7%	21 26.6%	31 22.8%	16 22.5%
Not sure	168 21.3%	22 16.8%	19 17.9%	20 20.4%	32 19.3%	20 25.3%	35 25.7%	19 26.8%

In thinking about an electronic records management solution for your organization, please assess the degree of receptivity to considering an outsourced solution from each of the following stakeholders. Security manager or executive

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	772	123	106	96	164	79	132	70
1 Would definitely consider	100 13.0%	17 13.8%	11 10.4%	12 12.5%	14 8.5%	11 13.9%	25 18.9%	10 14.3%
2 Might consider	264 34.2%	39 31.7%	45 42.5%	28 29.2%	60 36.6%	29 36.7%	42 31.8%	20 28.6%
3 Would never consider	227 29.4%	37 30.1%	29 27.4%	31 32.3%	54 32.9%	18 22.8%	36 27.3%	22 31.4%
Not sure	181 23.4%	30 24.4%	21 19.8%	25 26.0%	36 22.0%	21 26.6%	29 22.0%	18 25.7%

Are there certain types of documents that would NEVER be okay to outsource?

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	749	125	103	89	163	73	127	67
Yes	512 68.4%	71 56.8%	68 66.0%	59 66.3%	118 72.4%	46 63.0%	95 74.8%	54 80.6%
No	237 31.6%	54 43.2%	35 34.0%	30 33.7%	45 27.6%	27 37.0%	32 25.2%	13 19.4%

What are (or would be) the primary obstacles in your organization to implementing an outsourced electronic records management solution? (Select all those that apply.)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		765	128	103	97	164	77	127
Concern about communication effectiveness between organization and outsource partner.	463 60.5%	88 68.8%	62 60.2%	60 61.9%	98 59.8%	45 58.4%	65 51.2%	44 65.7%
Uncertainty about how to measure performance.	261 34.1%	54 42.2%	38 36.9%	37 38.1%	46 28.0%	29 37.7%	41 32.3%	15 22.4%
Concern about security issues.	639 83.5%	97 75.8%	85 82.5%	80 82.5%	141 86.0%	62 80.5%	110 86.6%	63 94.0%
Concern about compliance issues.	427 55.8%	57 44.5%	52 50.5%	59 60.8%	83 50.6%	45 58.4%	82 64.6%	49 73.1%
Lack of internal experience in managing outsourced relationships.	237 31.0%	45 35.2%	34 33.0%	28 28.9%	54 32.9%	24 31.2%	38 29.9%	12 17.9%
Opposition from the IT department.	230 30.1%	32 25.0%	28 27.2%	30 30.9%	49 29.9%	24 31.2%	40 31.5%	25 37.3%
Opposition from the records management staff.	215 28.1%	21 16.4%	29 28.2%	29 29.9%	48 29.3%	15 19.5%	45 35.4%	26 38.8%
Lack of control and flexibility.	545 71.2%	85 66.4%	74 71.8%	73 75.3%	119 72.6%	52 67.5%	91 71.7%	49 73.1%

In considering an outsourced electronic records management solution, how important are each of the following (Extremely important, important, somewhat important, not important at all)? Mitigating Compliance Risks - Developing record management processes that closely manage the digital capture, archiving and destruction of critical records in order to enhance accountability and improve the evidentiary reliability of pre-trial discovery.

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		762	129	103	93	165	76	127
1 Extremely important	429 56.3%	47 36.4%	50 48.5%	51 54.8%	95 57.6%	54 71.1%	86 67.7%	45 67.2%
2 Important	229 30.1%	40 31.0%	34 33.0%	26 28.0%	58 35.2%	16 21.1%	35 27.6%	19 28.4%
3 Somewhat important	70 9.2%	29 22.5%	11 10.7%	10 10.8%	9 5.5%	3 3.9%	5 3.9%	3 4.5%
4 Not important at all	34 4.5%	13 10.1%	8 7.8%	6 6.5%	3 1.8%	3 3.9%	1 0.8%	0 0.0%

In considering an outsourced electronic records management solution, how important are each of the following (Extremely important, important, somewhat important, not important at all)? Accessing Information - Integrating your physical and electronic records, organizing them and storing the critical information in a digital repository-giving your staff the ability to quickly capture, preserve and share information critical to e-government and knowledge management.

	Approximately how many employees are there in your ORGANIZATION as a whole?							
	Total*	1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	758	129	100	93	165	75	127	67
1 Extremely important	525 69.3%	81 62.8%	67 67.0%	60 64.5%	119 72.1%	60 80.0%	88 69.3%	49 73.1%
2 Important	188 24.8%	33 25.6%	26 26.0%	24 25.8%	40 24.2%	12 16.0%	36 28.3%	16 23.9%
3 Somewhat important	26 3.4%	7 5.4%	3 3.0%	6 6.5%	4 2.4%	1 1.3%	3 2.4%	2 3.0%
4 Not important at all	19 2.5%	8 6.2%	4 4.0%	3 3.2%	2 1.2%	2 2.7%	0 0.0%	0 0.0%

In considering an outsourced electronic records management solution, how important are each of the following (Extremely important, important, somewhat important, not important at all)? Reducing Costs - Drastically reducing the overall cost of labor and paper storage while minimizing time spent reconstructing critical information in case of disaster, theft or loss.

	Approximately how many employees are there in your ORGANIZATION as a whole?							
	Total*	1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
	757	130	99	92	164	76	127	67
1 Extremely important	364 48.1%	60 46.2%	39 39.4%	43 46.7%	72 43.9%	46 60.5%	62 48.8%	40 59.7%
2 Important	273 36.1%	46 35.4%	45 45.5%	37 40.2%	60 36.6%	23 30.3%	42 33.1%	20 29.9%
3 Somewhat important	87 11.5%	13 10.0%	9 9.1%	6 6.5%	26 15.9%	4 5.3%	23 18.1%	6 9.0%
4 Not important at all	33 4.4%	11 8.5%	6 6.1%	6 6.5%	6 3.7%	3 3.9%	0 0.0%	1 1.5%

Who in your organization has THE MOST IMPORTANT role in determining whether or not to implement an electronic records management solution? (Select one.)

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		783	133	104	96	170	76	132
Legal	99 12.6%	9 6.8%	10 9.6%	12 12.5%	17 10.0%	11 14.5%	27 20.5%	12 17.1%
Information Technology	187 23.9%	22 16.5%	19 18.3%	32 33.3%	42 24.7%	21 27.6%	35 26.5%	16 22.9%
Tax/Audit	9 1.1%	1 0.8%	1 1.0%	1 1.0%	1 0.6%	0 0.0%	3 2.3%	2 2.9%
Records Management	178 22.7%	23 17.3%	33 31.7%	26 27.1%	39 22.9%	19 25.0%	20 15.2%	18 25.7%
Operations/Administration	141 18.0%	44 33.1%	25 24.0%	11 11.5%	28 16.5%	11 14.5%	18 13.6%	3 4.3%
Compliance/Risk	60 7.7%	11 8.3%	2 1.9%	4 4.2%	20 11.8%	6 7.9%	10 7.6%	7 10.0%
Line of Business	74 9.5%	14 10.5%	11 10.6%	7 7.3%	15 8.8%	4 5.3%	17 12.9%	6 8.6%
Finance	35 4.5%	9 6.8%	3 2.9%	3 3.1%	8 4.7%	4 5.3%	2 1.5%	6 8.6%

Think about the reasons why you might implement electronic records management technologies in your organization. Please check the TWO that are the MOST important (please check only TWO).

	Total*	Approximately how many employees are there in your ORGANIZATION as a whole?						
		1 to 100	101 to 500	501 to 1,000	1,001 to 5,000	5,001 to 10,000	10,001 to 50,000	Over 50,000
		797	134	109	101	166	79	135
Compliance	401 50.3%	38 28.4%	47 43.1%	35 34.7%	95 57.2%	48 60.8%	84 62.2%	52 73.2%
Leadership, competitive advantage	50 6.3%	12 9.0%	7 6.4%	8 7.9%	6 3.6%	5 6.3%	6 4.4%	6 8.5%
Improve efficiency and productivity	480 60.2%	91 67.9%	76 69.7%	70 69.3%	93 56.0%	40 50.6%	73 54.1%	37 52.1%
Risk management/Business continuity	297 37.3%	40 29.9%	41 37.6%	41 40.6%	59 35.5%	27 34.2%	56 41.5%	32 45.1%
Better customer service	144 18.1%	28 20.9%	24 22.0%	23 22.8%	35 21.1%	9 11.4%	14 10.4%	11 15.5%
Reduce costs	147 18.4%	26 19.4%	20 18.3%	22 21.8%	29 17.5%	16 20.3%	25 18.5%	8 11.3%
Faster turnaround, improved response	121 15.2%	27 20.1%	19 17.4%	19 18.8%	22 13.3%	13 16.5%	11 8.1%	10 14.1%
Increased profits, better performance	51 6.4%	17 12.7%	7 6.4%	5 5.0%	4 2.4%	5 6.3%	6 4.4%	7 9.9%

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