

2010 TEC for Exchange Attendee Survey Results

Highlights and Analysis

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Executive Summary

This document summarizes the findings of a survey conducted at The Experts Conference (TEC) 2010. This conference was held by Quest on April 25-28 in Los Angeles, California, for the identity and access management (IAM), Exchange, and SharePoint communities. Our goal with that survey and this document is to better understand the issues that our attendees' organizations face; how they prioritize those issues; their current tool usage; and their common practices for Windows infrastructure management tasks. This information will help Quest build better products and provide organizations with knowledge and best practices for better productivity and efficiency.

Survey Key Points

Demographics

- TEC 2010 attracted 324 conference delegates from 205 companies in 23 countries.
- 146 attendees responded to the overall survey, and 26 attendees responded to the sections of the survey that were specific to Exchange.
- Exchange survey respondents are primarily technicians (88 percent) with more than five years of experience in their current roles (73 percent). They are evenly split between corporate and government IT organizations and the vendor community (consultants, service providers and software vendors).

Findings

Economy and Jobs

- Despite the economy, 77 percent of respondents are satisfied or very satisfied with their jobs, which is the highest level ever reached in this survey.
- Organizational politics, lack of people resources, and excessive workload are the three top job challenges.

Environment Size and Version

- Exchange 2007 is the most widely deployed version; it is in use at 73 percent of responding organizations.
- 85 percent of respondents are deploying or planning to deploy Exchange 2010, most within the next twelve months.

Exchange Management

- 85 percent of IT respondents and 92 percent of vendor respondents rate their organization's Exchange management proficiency as "better than average" or "world class."

Alternatives to On-Premises Exchange

- Cloud-based messaging platforms have yet to catch on; none are deployed in production and only a few respondents are evaluating Microsoft offerings.

Security and Compliance

- 70 percent of survey respondents rate their e-mail compliance processes as less than optimal.

Mobile Devices

- RIM Blackberry is the most widely supported mobile device.

Office Communications Server

- 48 percent of survey respondents are using Office Communications Server (OCS 2007) in production.

Support

- Only 30 percent of survey respondents consider their Exchange support environments to be well automated, while 35 percent lack necessary automation or rely primarily on manual methods.

About TEC

General Information

TEC is the premier annual conference for sophisticated users of Microsoft Identity and Access (IDA), Exchange, and SharePoint technologies. Delivering leading-edge technical education from the industry's top experts and Microsoft technology leadership, TEC emphasizes topics and best practices that help IT professionals better use and manage their critical Microsoft technologies on a daily basis.

TEC 2010 Overview

Sponsored by Quest in partnership with Microsoft, TEC 2010 was the ninth annual event in the series. Focused on enhancing the skills of the most experienced users of Microsoft's critical platform technologies, TEC 2010 offered: in-depth, highly technical content; one-on-one access to industry leaders and Microsoft program management; and valuable networking and career advancement opportunities.

TEC 2010 contained three concurrent conferences dedicated to delivering advanced education and training on Microsoft's latest technology platform releases:

- **TEC for Directory & Identity**, which covered Active Directory, Forefront Identity Manager (FIM), and Active Directory Federation Services (ADFS)
- **TEC for Exchange**, which focused on Microsoft Exchange Server 2010
- **TEC for SharePoint**, which concentrated on SharePoint 2010

Participants enjoyed seven half-day pre-conference workshops and nine tracks of in-depth sessions with presentations, interactive discussions and thought-provoking commentary by top-rated experts from Microsoft and the field.

2010 Exchange Highlights

2010 marked the second year for TEC for Exchange. The conference offered two pre-conference workshops, "Migrating Exchange 2007 to Exchange Online via Microsoft Online Services" and "A Hands-on Workshop on Exchange 2010 High Availability," and featured 22 sessions across two concurrent tracks. Popular sessions included:

- **Konstantin Ryvkin**, Senior Technology Architect at Microsoft, presented the opening keynote, "Exchange 2010 Enterprise Deployment and Architecture at Microsoft." Ryvkin drew from his experience architecting Microsoft's 200,000-seat Exchange infrastructure to provide an overview and a series of deep dives into the core aspects of what it takes to plan, build and run a large-scale, distributed Exchange environment.
- **Ross Smith IV**, Microsoft's Senior Program Manager for Exchange Server, delivered the presentation, "Exchange Server 2010—Architecture." In addition to describing the overall architecture of Exchange Server 2010, this session provided the background and framework for understanding the other Exchange 2010 sessions in the conference.
- **Dmitri Gavrillov's** session, "The Robot Who Makes Mailbox Migrations Less Painful," was especially popular with conference attendees. Focusing on Mailbox Replication Service, a new agent in Exchange 2010, Gavrillov, a senior development lead at Microsoft, examined topics such as online mailbox moves, automatic error recovery, and distributed throttling.

About the TEC Survey

Introduction

The 2010 TEC survey is the sixth in the series of annual conference surveys. Since TEC has evolved into three discrete but interrelated technology conferences, Quest conducted separate surveys for each conference. Each survey focused on issues, practices and technologies specific to a particular conference, but all surveys also included a common set of questions on economic issues, job satisfaction, and technology trends. This approach enabled attendees to respond to questions targeted to their areas of expertise as well as voice their opinions on trends that span the three conferences.

This document summarizes the information captured through the survey, provides data analysis and trend highlights, and explains our insights on the implications of the findings, first for the set of questions common to all three surveys and then for the questions specific to the Exchange conference. Where relevant, the analyses differentiate between IT (corporate and government) and vendor (consultant, service provider, and software vendor) respondents.

We believe the following survey results provide solid data for comparisons with peer organizations and identify issues and opportunities for organizations to consider as they evaluate their own infrastructure software management practices and investments.

We will continue to conduct these surveys at future TEC events, and we welcome suggestions for future questions and analysis areas.

Survey Demographics

Combined, the three TEC surveys attracted a strong response from attendees: 146 out of 324 conference delegates responded, for an overall response rate of 45 percent in 2010. The TEC for Exchange section of the survey was completed by 26 of 67 attendees, for a response rate of 39 percent, and included a representative sample of attending roles and organizations.

The TEC for Exchange conference survey respondents have the following demographic characteristics.

- **Organization type** – 50 percent of respondents are from corporate or government IT organizations; 27 percent are from consulting firms; and the remaining 23 percent of respondents represent a mixture of service provider and software vendor companies.
- **Organization size** – 46 percent of the respondents are from organizations with more than 1,000 employees; 23 percent from organizations with 100 to 1,000 employees; and 31 percent are from small organizations with fewer than 100 employees.
- **Technical expertise** – 88 percent of respondents have technical backgrounds. The most common titles are architect (31 percent) and consultant (23 percent).
- **Experience** – Respondents are highly experienced in their current roles: 58 percent have more than 10 years of experience, 15 percent have between 5 and 10 years, and 15 percent have 3 to 4 years of experience.
- **Responsibilities** – 54 percent of respondents have three or more organizational responsibilities. The top three responsibilities reported by IT respondents are operations (85 percent), administration (77 percent), and user support (62 percent). The top responsibilities among vendor respondents are consulting (77 percent), operations (31 percent) and administration (23 percent).

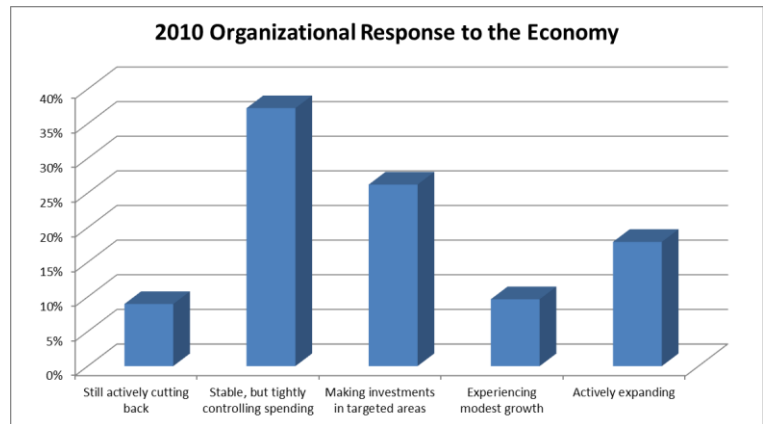
Overall TEC Survey Results

This section reports on data merged from the Directory & Identity, Exchange, and SharePoint surveys.

Economy and Jobs

The economy is showing signs of improvement.

TEC attendee survey responses show signs that the economy is beginning to recover. While “Stable, but tightly controlling spending” is the most common response in the economic category, twice as many companies are actively expanding (18 percent) are continuing to cut back (9 percent). Even more encouraging, 54 percent of respondent companies are spending money on targeted investments or growth. Specific findings include the following:



- Consulting firms and software vendors show the greatest improvement with 57 percent and 80 percent respectively reporting modest growth or active expansion.
- Cost controls remain greatest within government IT organizations with 60 percent tightly controlling spending and 13 percent still actively cutting back.
- Corporate IT organizations remain economically conservative, but 31 percent are making targeted investments and 18 percent are experiencing growth.

Job satisfaction reached a high point among TEC attendees.

Despite the economy, 77 percent of TEC attendees report being “Satisfied” (42 percent) or “Very Satisfied” (35 percent) with their jobs, a marked improvement over 2009’s 70 percent satisfaction level. Weighing responses using a 5-point scale (from 1 for “Very Dissatisfied” to 5 for “Very Satisfied”), we found that:

- Overall job satisfaction averaged across all participants reached a new high of 4.05 in 2010, recovering from a recession-related dip in 2009 (3.82) and 2008 (3.88) and slightly exceeding 2007’s 4.03 average.
- Business systems analysts are the happiest employees by title, with an average score of 4.4, closely followed by administrators and the category of “IT Managers, Directors, and VPs,” whose roles tie with an average score of 4.3.
- Systems engineers are the least satisfied employees by job title, with an average score of 3.8.
- Not surprisingly, job satisfaction is correlated with a company’s response to the economy:

Response to the Economy	Average Job Satisfaction Score
Still actively cutting back	3.4
Stable, but tightly controlling spending	4.0
Making investments in targeted areas	4.1

Experiencing modest growth	4.2
Actively expanding	4.3

The big three job challenges are organizational politics, lack of people resources, and excessive workload.

Organizational politics and lack of people resources are issues for 48 percent of IT respondents, topping the list of IT job challenges. Excessive workload follows closely behind, cited as an issue by 43 percent. Vendors agree with IT that these are the three top challenges, but they rank excessive workload in first place; it was cited as an issue by 60 percent of vendor respondents.

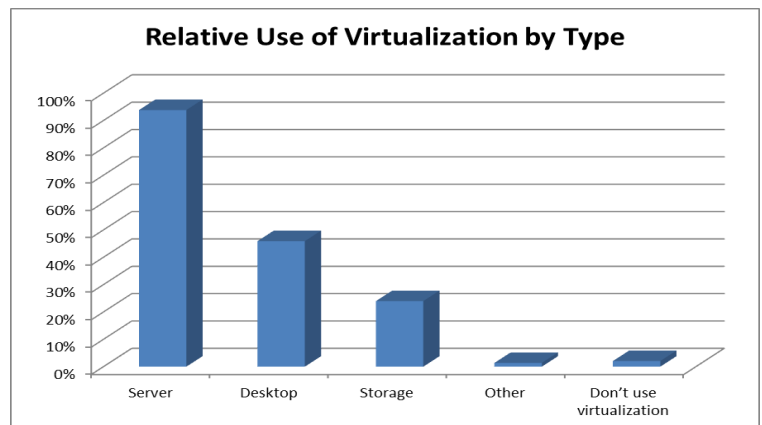
Virtualization

Virtually everyone uses virtualization.

Virtualization is ubiquitous among overall TEC respondent organizations, with 91 percent using virtualization in production. Of the remaining organizations, 4 percent are currently evaluating virtualization technologies, 3 percent plan to deploy within 12 months and only 2 percent have no plans to use virtualization.

Servers are by far the most popular target for virtualization.

About 24 percent of TEC survey respondents report using storage virtualization, and almost twice as many (46 percent) deploy desktop virtualization. But server virtualization is easily the most widely deployed version: 94 percent of respondents are using or evaluating it.



VMware is the dominant virtualization platform.

Used by 93 percent (IT) and 82 percent (vendor) of respondents, VMware is solidly the virtualization platform market leader. Microsoft Hyper-V has made significant inroads in the vendor community (70 percent) but is used by only 27 percent of IT organizations. Citrix XenServer is used by 21 percent of IT organizations and 24 percent of vendor organizations.

Most organizations will standardize on a single virtualization platform.

IT organizations prefer to support a single virtualization platform; 66 percent have already standardized on a chosen platform, and another 8 percent is evaluating multiple options, but plan to standardize on one. While a slight majority of vendors (52 percent) have or will standardize on a single platform, 44 percent are planning to support multiple platforms compared to only 20 percent of IT organizations. The platforms of choice are the following:

- Of the IT organizations that have already standardized on a single platform, 95 percent have selected VMware, 3 percent have chosen Microsoft Hyper-V, and 2 percent have selected Citrix XenServer.

- All IT and vendor organizations planning to support multiple platforms use VMware. Citrix XenServer has a slight edge over Microsoft Hyper-V as an additional platform among IT respondents, but Microsoft Hyper-V dominates 6 to1 among vendors.

Cloud Services and Other Outsourcing

Cloud services are still in the early adopter stage for IT.

Despite the considerable attention the technology receives, only 10 percent of IT respondent organizations are currently using cloud services in production. However, 39 percent are evaluating cloud services, 2 percent are planning to deploy within 12 months and 15 percent are considering whether to move forward, which indicates potential for a surge in production use over the next year.

Production use of cloud services is much higher (29 percent) among vendor organizations, but the smaller percentage of evaluators (19 percent) suggests the first wave of vendor adoption has already peaked. Slightly less than 40 percent of both IT and vendor respondents are not interested in cloud services.

Cost reduction is the #1 driver for considering cloud services.

Cost and risk reduction trump factors related to business improvement as the top drivers for considering cloud services. Cost reduction is the first-place driver, cited by 34 percent of IT and vendor respondents; business continuity and risk reduction, cited by 17 percent of IT and 30 percent of vendor respondents, takes second place. Factors such as enhanced service levels, higher quality, and greater predictability of cost were cited by less than 10 percent of IT respondents. Only 3 percent of IT respondents and 12 percent of vendor respondents view cloud services as a source of superior business functionality.

E-mail is easily the most popular cloud service.

E-mail tops the list of cloud service applications considered by IT and vendor respondents with web conferencing taking second place. The second table below illustrates interesting differences between the choices of large IT organizations (>1,000 employees) and smaller IT organizations (<1,000 employees).

Has your enterprise considered cloud services for any of the following business processes?*	IT	Vendor	Has your enterprise considered cloud services for any of the following business processes?*	Large IT (>1,000)	Smaller IT (<1,000)
Email	26%	38%	Email	28%	23%
Web conferencing	19%	18%	Office applications	21%	13%
Office applications	18%	6%	Web conferencing	16%	23%
Systems management	16%	12%	Systems management	14%	18%
Email archiving	10%	18%	Customer relationship management	11%	8%
Customer relationship management	9%	12%	Email archiving	9%	13%
Ediscovery	7%	4%	Ediscovery	7%	8%
Desktop management	6%	12%	Desktop management	5%	8%
Customer support	4%	0%	Customer support	5%	3%
Elastic compute technologies	4%	2%	Elastic compute technologies	5%	3%
Email migration	3%	6%	Email migration	4%	3%

* Respondents can choose multiple options

Most organizations have yet to choose their primary cloud services platform.

Few companies have selected their primary cloud services platforms yet, highlighting the early stage of market adoption. The 3 percent of IT respondents who have selected a platform are evenly split between Microsoft Azure Services Platform, Google App Engine, and Amazon Web Services, while the Azure Services Platform leads among the 19 percent of vendor respondents who have selected a platform.

Using existing on-premise administrators is the most popular option for supporting cloud service processes.

By a three to one margin, IT and vendor respondents plan to use their existing organizations to support cloud applications rather than setting up cloud-specific support teams. This preference is correlated with experience with the technology: organizations already using cloud services in production are far more likely to use existing administrators than those evaluating or still considering cloud services.

25 percent of TEC respondents use a managed services provider (MSP).

Outsourcing processes and/or services to a MSP has moved past the early adopters; it is an accepted practice at 25 percent of responding organizations. With a pipeline of 18 percent of IT and 24 percent of vendors either evaluating or still considering adoption, usage will continue to grow modestly over the next several years. To achieve faster growth, MSPs will have to convince the 54 percent of responding organizations that are not using or considering managed services to move off the sidelines.

Exchange Survey Results

This section evaluates responses collected solely from TEC for Exchange conference attendees.

Exchange respondents support diverse numbers of users.

The number of e-mail users supported by Exchange survey respondents directly correlates to the size of their organizations. More than half of both IT (53 percent) and vendor (54 percent) respondents support large (5,000 to 20,000) to very large (>20,000) numbers of users. At the other end of the scale, 31 percent of IT respondents and 38 percent of vendor respondents support 500 or fewer e-mail users. Vendor respondent distribution likely shows a split between personnel (such as service provider support teams) who serve large numbers of external customers and those consulting or supporting their company's internal users.

How many Exchange users do you or your group support?	IT	Vendor
Over 20,000 users	15%	23%
5,000 to 20,000 users	38%	31%
1,000 to 5,000 users	15%	8%
500 to 1,000 users	0%	0%
100 to 500 users	23%	8%
Less than 100 users	8%	31%

Note: Total % are not equal 100% due to rounding

Exchange Environment Size and Version

Exchange 2007 is the most widely deployed version.

IT organizations led the shift to newer versions of Exchange over the past year, dropping support for the oldest versions as they move to Exchange 2007 and begin migrating to Exchange 2010. While most respondents have just one version of Exchange in current use, 42 percent use at least two versions of Exchange, and 19 percent use three versions.

Which version(s) of Exchange are currently in use at your organization? (choose all that apply)*	IT		Vendor	
	2010	2009	2010	2009
5.5	0%	4%	0%	1%
2000	0%	5%	0%	0%
2003	31%	62%	54%	33%
2007	77%	42%	69%	63%
2010	31%	---	62%	---
Microsoft Exchange Online	0%	---	8%	---

*Respondents can choose multiple options

85 percent of respondents are deploying or planning to deploy Exchange 2010.

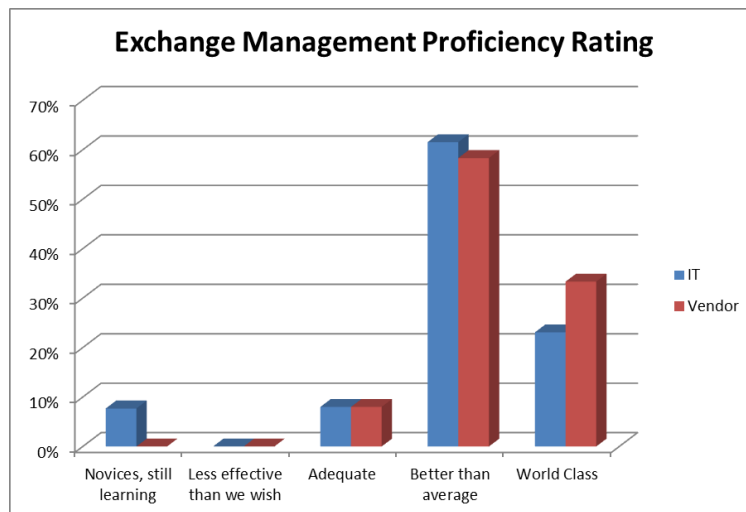
Exchange 2010 will rapidly become the standard production version of Exchange. Implementation is underway within 23 percent of IT and 54 percent of vendor organizations. A majority of IT respondents plan to deploy within 12 months, and 31 percent of vendor respondents will migrate within 24 months.

Is your organization planning to migrate to Exchange 2010?	IT	Vendor
Yes, implementation in progress	23%	54%
Plan to deploy within 12 months	62%	23%
Plan to deploy within 24 months	0%	8%
Still considering	8%	15%
No current plans	8%	0%
Note: Total % may not equal 100% due to rounding		

Exchange Management

TEC for Exchange attendees represent highly proficient organizations.

Survey respondents rate their organizations very high in Exchange management proficiency, with 85 percent of the IT respondents and 92 percent of the vendor respondents rating their organizations as “better than average” or “world class.” As in the other TEC conferences, vendor respondents tend to rate their organizations higher than IT respondents, reflecting the higher level of expertise required when supplying services to an external



market. No respondents considered their organizations “less effective than we wish,” and only 8 percent considered their organization’s skills merely “adequate.”

Alternatives to On-Premises Exchange

TEC for Exchange attendees show no interest in Google Apps.

TEC for Exchange attendees are a heavily Microsoft-focused group; aside from one vendor respondent evaluating Gmail, no one else is using or evaluating Gmail, Google Docs, Google Calendar, or any other Google Apps.

Cloud-based Exchange hasn’t caught on yet.

Cloud-based Exchange is only beginning to make inroads within the TEC for Exchange community. No respondents are currently using cloud-based Exchange in production, but a small number of organizations are in the midst of evaluations. As usual, vendors are more likely to be early adopters than IT organizations:

- 15 percent of vendor respondents are evaluating Exchange Online.
- 15 percent of vendor respondents and 8 percent of IT respondents are evaluating Business Productivity Online Standard Suite (BPOS).

There is even less interest in non-Microsoft cloud-based messaging platforms.

Cloud-based Exchange may currently interest only early adopters, but the major non-Microsoft cloud-based messaging platforms get no interest at all from survey respondents. Aside from one vendor respondent using Mimecast, no one is using or even evaluating VMware Zimbra, Cisco WebEx Mail, Lotus Live, POP/IMAP or any other non-Microsoft cloud-based messaging platform.

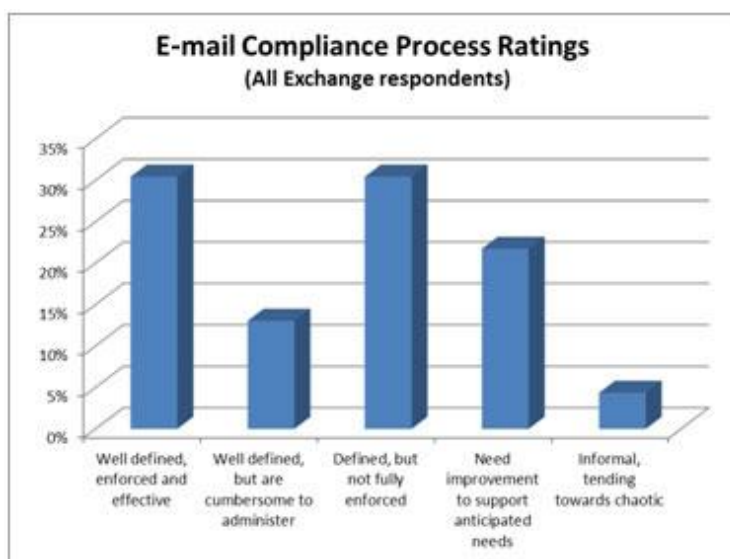
Security and Compliance

Windows security gaps are not a significant issue for most respondents.

When asked an open-ended question about the Windows security gaps that cause the most issues for their organizations, few respondents had concerns. Patches were the most common source of issues; concerns included the time span between Windows patches and the impact of security changes in applications made through patches or upgrades. Other security gaps mentioned include Internet Explorer and lack of application knowledge.

E-mail compliance processes are less than perfect for 70 percent of respondents.

Only 30 percent of survey respondents were fully satisfied with their e-mail compliance processes (that is, rating them as “Well defined, enforced and effective”). 25 percent of IT respondents said their processes are well defined but cumbersome to administer. Enforcement is an issue for 25 percent of IT respondents and 36 percent of vendor respondents. Another 25 percent of IT respondents and 18 percent of vendor respondents believe their compliance processes need improvement before they will be able to support anticipated needs. One vendor organization reported that their compliance processes were informal and tending toward chaotic.



Compliance and auditing activities continue to draw more support resources.

Externally-driven activities such as supporting audits, compliance reporting, supporting e-Discovery, and maintaining security continue to require more resources every year:

- Audit support requirements and compliance reporting resource needs increased or significantly increased for 31 percent of IT respondents over the past year while dropping for only 8 percent.
- The two top areas of increasing resource needs for IT organizations are:

- eDiscovery support (31 percent say needs have increased, and another 8 percent say needs have increased significantly)
- Maintaining security (23 percent say needs have increased, and another 15 percent say needs have increased significantly)
- Among vendor respondents, 23 percent reported increased resource needs for compliance reporting, and 16 percent reported increased needs for audit support.

Mobile Devices

Blackberry tops the list of supported mobile devices.

Mobile devices are a fact of life for TEC for Exchange attendees; all support at least one mobile device at their organization. RIM Blackberry is easily the supported device, but Windows Mobile and the Apple iPhone have solid support among vendor respondents and are making inroads within IT organizations.

While many respondents support multiple devices, none are device agnostic; their organizations provide users with a defined group of standard options rather than supporting additional devices whenever requested.

Does your organization support any of the following mobile devices? (check all that apply)*	IT	Vendor
Blackberry	85%	77%
Windows Mobile	54%	62%
iPhone	46%	62%
G1 Phone	0%	8%

*Respondents can choose multiple options

Office Communications Server

Office Communications Server has reached the mainstream.

The use of Office Communications Server (OCS) 2007 has reached critical mass; almost half of all Exchange survey respondents already use it in production. OCS 2007 should achieve majority usage by next year, given the percentage of organizations currently evaluating it, planning to implement it within 12 months, and still considering its use. Only a third of respondents are not using or considering OCS 2007.

Does your organization use Office Communications Server (OCS 2007)?	IT	Vendor
Yes, using it in production	42%	54%
Currently evaluating	0%	8%
Plan to move within 12 months	17%	0%
Plan to move within 24 months	0%	0%
Still considering	8%	8%
No	33%	30%

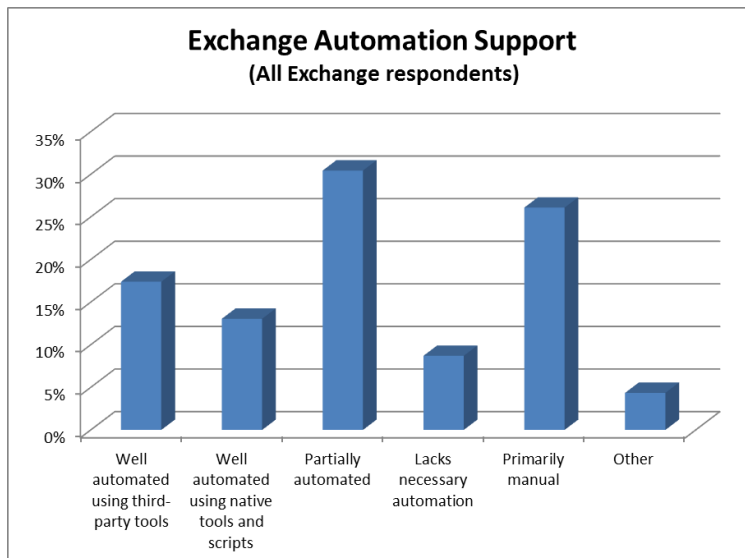
Support

Only 30 percent of respondents consider their Exchange support environment well automated.

The availability of effective automation is a perennial issue at TEC events. Despite improving tool options and increasingly complex technical environments, most responding organizations are partially automated at best, and a surprisingly large percentage of organizations rely primarily on manual methods. Overall, only 30 percent of respondents consider their organizations to be well automated using scripts, native tools or third-party tools.

The level of automation use is higher for vendors than IT organizations, as shown in the table below; however, more vendor organizations rely on manual methods. The level of automation is not correlated with organization size;

approximately half of the respondents reporting a lack of necessary automation or a reliance on primarily manual methods are from very large (>1,000) employee organizations.



How would you describe your organization's use of automation for Exchange support?	IT	Vendor
Well automated using third-party tools	9%	25%
Well automated using native tools and scripts	9%	17%
Partially automated	36%	25%
Lacks necessary automation	18%	0%
Primarily manual	18%	33%
Other	9%	0%

Note: Total % may not equal 100% due to rounding

PowerShell and Microsoft Management Console are the most popular Exchange support tools.

When asked to name the top three Exchange management tools that make their lives easier, survey respondents provided a diverse list of mostly Microsoft products and tools. PowerShell was the most popular tool, accounting for 15 percent of responses. As a group, Microsoft Management Console (MMC) and Exchange Management Console garnered 23 percent of responses. Other tools receiving multiple mentions include Exchange Management Shell (8 percent), Quest Spotlight on Messaging (8 percent), and custom scripts (8 percent).

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