

2010 TEC for SharePoint 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, which Quest held 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, in order to 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 24 attendees responded to the sections of the survey specific to SharePoint.
- SharePoint survey respondents are primarily technicians (96 percent) who work for large corporate and government IT organizations (83 percent) and who have more than five years of experience in their current roles (75 percent).

Findings

Economy and Jobs

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

SharePoint Version

- SharePoint 2007 is the most widely deployed version, used by 96 percent of respondents. However, 88 percent of respondents will deploy SharePoint 2010 within the next year; a majority of respondents (58 percent) are already piloting this version.

Collaboration

- SharePoint is the only collaboration platform for 65 percent of respondents.

Application Development and Deployment

- 43 percent of respondents describe their process for developing and deploying SharePoint applications as “in between formal and informal.”

SharePoint Management

- Establishing effective governance policies is the top SharePoint management concern; it was listed as an issue by 71 percent of survey respondents.
- 70 percent of respondents believe SharePoint 2010's management tool offers significant improvements over its SharePoint 2007 predecessor, but 61 percent say functional gaps still remain.

Migration to SharePoint 2010

- Respondents list improved workflow, sandboxed solutions, and streamlined central administration as the three most exciting new features in SharePoint 2010.
- The most frequently cited SharePoint 2010 migration challenge is balancing resources between day-to-day support and the migration effort.
- 33 percent of respondents rate their organization's SharePoint management proficiency as “less effective than we wish.”

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 TEC SharePoint Conference Highlights

Launched in 2010, TEC for SharePoint began strongly with two pre-conference workshops, "SharePoint 2010 Security End-To-End" and "Guiding your SharePoint Developers to 2010 Bliss," and it featured 28 sessions across three concurrent tracks. Popular sessions included:

- **Bill Baer**, Technology Architect with Microsoft SharePoint Online, kicked off the conference with his opening keynote address, "SharePoint 2010 Technical Roadmap." He explored the evolution of SharePoint as an enterprise platform from its on-premises beginnings to its cloud services future.
- **Dux Raymond Sy**, a leading expert in using technology to enhance project management, inspired serious note-taking in the audience with his presentation, "How to Effectively Manage SharePoint projects." Drawing from his fifteen years of IT experience, Sy covered how to ensure SharePoint project success through executive support, proper planning, and appropriate management of expectations.
- **Joel Oleson**, SharePoint evangelist at Quest and popular blogger, covered strategies and methods for conducting a successful upgrade from SharePoint 2007 to SharePoint 2010. He discussed binary and visual upgrades, possible approaches, and best practices tempered by lessons learned from early upgrade experiences.

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 SharePoint 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 SharePoint section of the survey was completed by 24 of 61 attendees, for a response rate of 39 percent, and included a representative sample of attending roles and organizations.

The TEC SharePoint conference survey respondents have the following demographic characteristics:

- **Organization type** – Slightly more than 83 percent of respondents are from corporate or government IT organizations; the remaining 17 percent of respondents are consulting firm employees.
- **Organization size** – 45 percent of corporate and government IT respondents are from organizations with more than 1,000 employees; 35 percent are from mid-sized organizations; and 20 percent are from small organizations with fewer than 100 employees. All vendor respondents were from organizations with 50 or fewer employees.
- **Technical expertise** – 96 percent of respondents have technical backgrounds. The three most common job titles were administrator (29 percent), systems engineer (21 percent) and architect (17 percent).
- **Experience** – Respondents are highly experienced in their current roles: 25 percent have more than 10 years of experience, 50 percent have between five and 10 years, and 17 percent have three to four years of experience.
- **Responsibilities** – 50 percent of respondents have three or more organizational responsibilities. The top responsibilities reported by IT respondents are administration (60 percent), user support (50 percent), operations (40 percent), and software development (40 percent). The top responsibilities reported by vendor respondents are consulting (100 percent) and operations (75 percent).

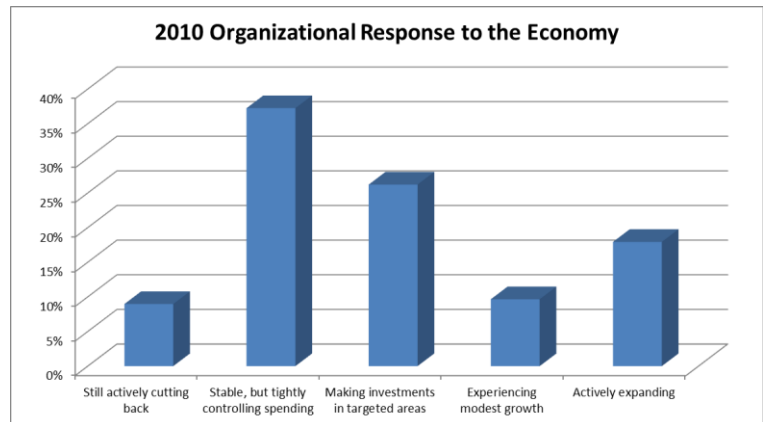
Overall TEC Survey Results

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) as 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, 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.

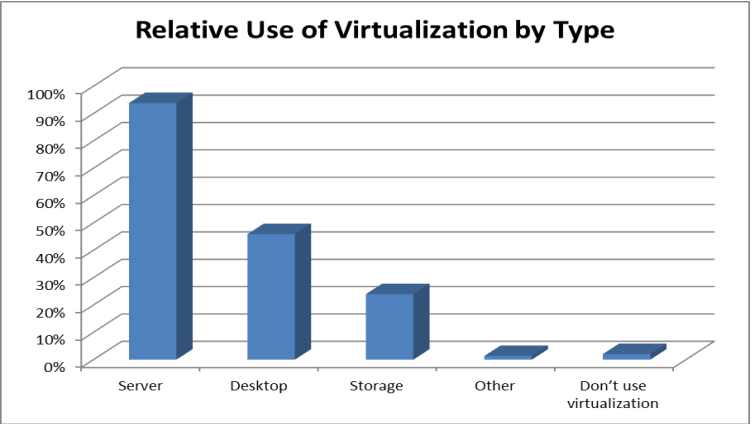
Virtualization

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 are 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 to 1 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, take 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

* 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 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 currently not using or considering managed services to move off the sidelines.

SharePoint Survey Results

This section evaluates responses collected solely from TEC for SharePoint conference attendees. Because only a small percentage of vendor respondents participated in the SharePoint survey, the results in this section present combined IT and vendor responses.

SharePoint Experience

Most respondents have been using SharePoint for at least three years.

Most TEC for SharePoint survey respondents are quite experienced: 38 percent have used SharePoint for three to four years and 21 percent for five or more years.

SharePoint respondents support diverse numbers of users.

The number of SharePoint users supported by survey respondents correlates directly to the size of their organizations. While 37 percent of respondents support large (5,000 to 20,000) to very large (>20,000) numbers of users, 34 percent fall into the mid-range (500 to 5,000 users), and 29 percent support 500 or fewer SharePoint users.

How long has SharePoint (any version) been deployed in your organization?	% Respondents *
Not Deployed	0%
Less than 1 year	4%
1 to 2 years	38%
3 to 4 years	38%
5 or more years	21%

* Adds to over 100% due to rounding

How many SharePoint users do you or your group support?	% Respondents
Over 20,000 users	29%
5,000 to 20,000 users	8%
1,000 to 5,000 users	13%
500 to 1,000 users	21%
100 to 500 users	21%
Less than 100 users	8%

SharePoint Version

SharePoint Server 2007 is the most widely deployed version.

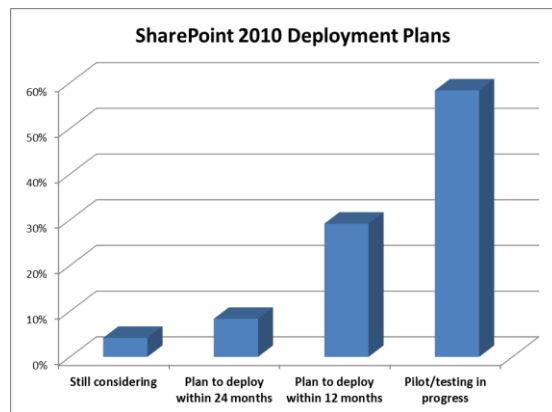
Most SharePoint organizations are still using Microsoft Office SharePoint Server 2007 (96 percent), followed by Windows SharePoint Services 3.0 (50 percent), and SharePoint 2010 (42 percent). 39 percent of organizations are still supporting even earlier versions.

Which version(s) of SharePoint are currently in use at your organization?	% Respondents*
SharePoint Portal Server 2003	25%
Windows SharePoint Services 2.0	13%
Windows SharePoint Services 3.0	50%
Microsoft Office SharePoint Server 2007	96%
SharePoint 2010	42%
None	0%

* Respondents can choose multiple options

88 percent will deploy SharePoint 2010 within the next year.

SharePoint 2010 is clearly popular with respondents: 88 percent will deploy it within the next 12 months, and 96 percent will deploy within two years. Of this group, 58 percent of respondents see enough value in the new version to be already piloting and/or testing it within their organizations. Only 4 percent of respondents are still considering whether to move to SharePoint 2010.



Collaboration

Collaboration is the top use for SharePoint.

SharePoint is most widely used for internally facing purposes, especially among IT organization respondents. The three most popular uses for SharePoint among survey respondents are collaboration (90 percent), intranet portal (75 percent), and document management (60 percent). SharePoint survey respondents appear to be less ready for more visible or client-facing SharePoint uses, such as extranet portal (33 percent), internet portal (29 percent) and full production business applications (17 percent); these percentages drop to 25 percent, 15 percent and 10 percent, respectively, when only IT respondents are considered.

How does your enterprise use SharePoint?	% Respondents
Collaboration	92%
Intranet Portal	79%
Document Management	67%
Project Management	54%
Mini business applications (quick hit, small scale)	42%
Extranet Portal	33%
Internet Portal	29%
Full production business applications	17%
Other	4%

* Respondents can choose multiple options

65 percent of respondents standardize on SharePoint as their collaboration platform.

SharePoint provides enough functionality to be the standard collaboration platform for most survey respondents; in fact, almost two thirds of respondents rely on it as their sole platform. Only 26 percent of respondents are using (22 percent) or considering (4 percent) other collaboration platforms to supplement SharePoint. While 4 percent of respondents are migrating from another platform to SharePoint, no one is considering a move away from it.

What is your organizational strategy for SharePoint?	% Respondents*
SharePoint is our only collaboration platform	65%
We use other collaboration platforms as well as SharePoint	22%
We are migrating from our other collaboration platforms to SharePoint	4%
We are considering other collaboration platforms as an alternative to SharePoint	0%
We are considering other collaboration platforms to supplement SharePoint	4%
Other	4%

* Total less than 100% due to rounding

Lotus Notes is the second most common collaboration platform.

While most responding organizations to use SharePoint as their sole collaboration platform, some also use other collaboration and content management systems. Lotus Notes, used by 13 percent of respondents, is the most commonly used platform after SharePoint. Products listed by respondents in the "Other" category included Blue Martini, Metadoc, Microsoft Content Management Server, Telligent Community Server and Wikimedia.

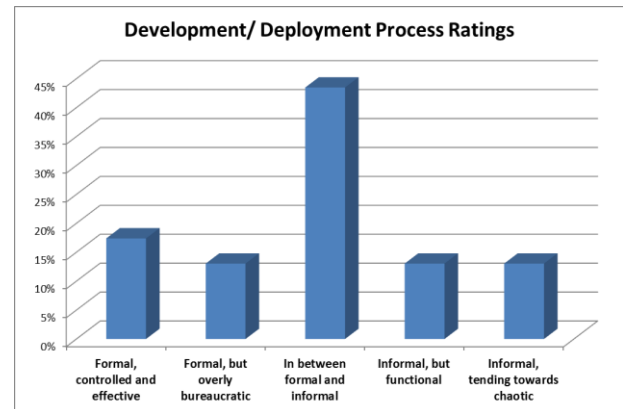
Does your enterprise use any other collaboration/content management platform?	% Respondents*
IBM Lotus Notes	13%
Open Source (ex: Plone, Magnolia, OpenCMS)	8%
EMC Documentum	4%
Interwoven TeamSite/Worksite	4%
IBM FileNet	4%
Google Wave	0%
Open Text Livelink ECM	0%
Xerox DocuShare	0%
Oracle Beehive	0%
Other	17%

* Respondents can choose multiple options

Application Development and Deployment

43 percent of respondents describe their processes for developing and deploying SharePoint applications as “in between formal and informal.”

For most organizations, the processes for developing and deploying new SharePoint applications are still maturing. Only 17 percent of respondents describe their current approach as “formal, controlled and effective,” while another 13 percent consider them to be “informal, but functional.” Some respondents think their organizations go too far in one direction or the other: 13 percent of respondents find their formal procedures to be “overly bureaucratic,” while 13 percent find that their informal processes are “tending towards chaotic.” The largest group of respondents (43 percent) falls mid-way between formal and informal approaches.



Insufficient expertise is a key challenge in developing or customizing SharePoint applications.

Survey participants provided a broad variety of responses to an open-ended question asking about the biggest challenges in developing or customizing SharePoint applications. Recurring themes included:

- Lack of knowledge about SharePoint and its capabilities and potential
- Insufficient training or technical expertise
- The difficulty of capturing user requirements

Respondents working with very large organizations noted the difficulty of supporting diverse needs across many differing groups. Management challenges include:

- The difficulties of creating a governance plan and enforcing governance policies
- Politics
- Lack of resources, time, and corporate funding.

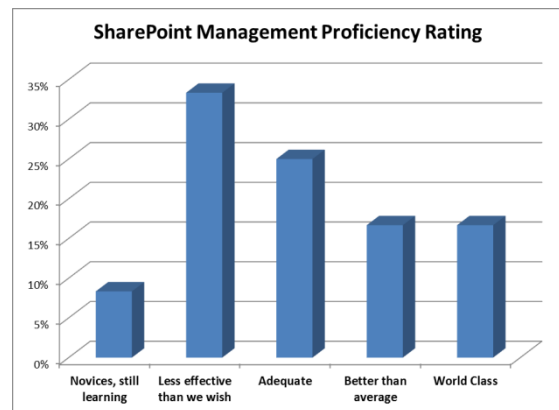
Technical challenges include:

- Limitations in the current technology
- Issues with backup and restore
- Lack of an integrated platform for SharePoint application development

SharePoint Management

33 percent of respondents rate their organization's SharePoint management proficiency as "less effective than we wish."

Managing SharePoint implementations can be challenging. Given SharePoint's power, breadth of uses, and governance requirements, it is not surprising that one-third of survey respondents consider their organizations "less effective than we wish" in their SharePoint management proficiency. But while some organizations struggle with SharePoint management, another third of respondents feel that their organizations are doing well, rating them as either "better than average" or "world class" in proficiency.



The management tool in SharePoint 2010 is a significant improvement, but gaps remain.

The majority of respondents (70 percent) believe that the SharePoint 2010 management tool is a significant improvement over its predecessor in SharePoint 2007, but only 9 percent believe it addresses all of their needs; 61 percent believe gaps remain. Respondents praised improvements in the SharePoint 2010 management tool such as Silverlight integration and an easy-to-use user interface, but also raised the following concerns about its capabilities:

- Difficulty of backup
- Need for a better development environment
- Need for more migration assistance
- Need for a MySites migration path
- Need to simplify patching and service pack installation

Respondents use few additional tools for SharePoint management.

While survey respondents acknowledge gaps in the SharePoint management tool, most seem to rely on it for the bulk of their support needs. Only 4 percent of the respondents believe they will need to rely heavily on third-party tools for SharePoint support. When asked to name the top three SharePoint management tools that make their lives easier, respondents provided a limited list. Several stated their efforts are mostly manual, while others say they rely on PowerShell. Third-party tools mentioned include:

- Quest Server Administrator for SharePoint,
- Quest Migration Manager for SharePoint
- Quest Site Administrator for SharePoint
- AvePoint DocAve
- Metalogix SharePoint Site Migration Manager

Managing and keeping track of SharePoint services, sites, content, and users are among the top technical concerns.

When survey respondents were asked to identify their top three technical concerns when managing their SharePoint installations, four concerns tied for first place. The complexity of enterprise SharePoint environments and keeping track of SharePoint services, sites, content and users are at the top of the list. The other top concerns were operational (managing performance/availability) and a business value driver (supporting application development).

Please select your top three SharePoint technical concerns	% Respondents*
Managing performance/availability	38%
Supporting application development	38%
Keeping track of SharePoint services, sites, content and users	38%
Complexity of the enterprise SharePoint environment	38%
Managing permissions	33%
Keeping up with server and storage resource demands	29%
Analyzing and reporting usage statistics	21%
Maintaining user accounts	17%
Enforcing enterprise security policies	17%
Managing SharePoint configurations	13%
Enforcing data privacy/confidentiality policies	8%
Quality of SharePoint support tools	4%
Other	4%

* Respondents can choose multiple options

Establishing effective governance policies is the top SharePoint management concern.

Given the complexity of SharePoint environments and the difficulty of tracking SharePoint artifacts, it is not surprising that survey respondents rank establishing effective governance policies as their top SharePoint management concern by a wide margin. The second place concern, level of administrative effort/resources required, correlated with the size and complexity of the SharePoint environment.

Please select your top three SharePoint management concerns	% Respondents*
Establishing effective SharePoint governance policies	71%
Level of administrative effort/resources required	42%
Finding skilled SharePoint professionals	38%
Pace of content growth	38%
Balancing control concerns against openness needed to support collaboration	38%
Level of data management effort resources required	17%
Controlling access to and display of confidential data	17%
Controlling the proliferation of SharePoint applications	13%
Providing audit traceability for regulatory compliance	8%
Other	4%

* Respondents can choose multiple options

Migration to SharePoint 2010

Improved workflow, sandboxed solutions, and streamlined central administration are rated the three most exciting features of SharePoint 2010.

Survey respondents are clearly excited by SharePoint 2010, as evidenced by their fast planned adoption rates. The new version offers something for everyone in its extensive list of new features. When asked to choose their top three features, a majority (58 percent) picked improved workflow, followed closely by sandboxed solutions (50 percent). Streamlined central administration (38 percent) rounds out the top three features.

Respondents choosing "Other" were asked to specify their choice in a text box. Features listed in this category include:

Which features are you or your customers most excited about with SharePoint 2010? (choose the top three)	% Respondents*
Improved workflow	58%
Sandboxed Solutions	50%
Streamlined Central Administration	38%
Developer Dashboard	33%
Usage Report and Logging	29%
Visual Studio 2010 SharePoint tools	29%
Health Analyzer	25%
Powershell Support	25%
Large List Resource Throttling	25%
Silverlight Web parts	25%
Unattached Content Database Recovery	21%
Visual Upgrade	13%
SharePoint Designer 2010	13%
Other	8%

* Respondents can choose multiple options

- Cross browser support
- Document management features
- Excel service
- Access service
- InfoPath form
- Overall improvements in performance

59 percent will upgrade an existing SharePoint implementation when migrating to SharePoint 2010.

Most (59 percent) respondents plan to upgrade an existing SharePoint implementation when migrating to SharePoint 2010 rather than setting up a new, internally supported environment (27 percent). Only a small percentage of respondents are migrating from another platform (Lotus Notes) to SharePoint 2010.

Which statement best describes your migration approach?	% Respondents
Migrating from another collaboration/content management platform	5%
Upgrading an existing SharePoint implementation	59%
Implementing SharePoint 2010 in a new internally supported environment	27%
Implementing SharePoint 2010 as a cloud (hosted) service	0%
No plans to migrate to SharePoint 2010	5%
Other	5%

Balancing resource requirements is the top SharePoint migration challenge.

Day-to-day support needs don't go away during a migration, and the two efforts compete for a limited pool of skilled SharePoint resources. As a result, balancing between day-to-day support and a migration effort is the top migration challenge, cited as an issue by 46 percent of survey respondents. In addition, while the new features in SharePoint are very attractive to respondents, 42 percent consider planning and implementing those enhanced capabilities to be their biggest migration challenge.

What are your biggest SharePoint migration challenges?	% Respondents
Balancing between day-to-day support and migration effort	46%
Planning for and implementing enhanced capabilities	42%
Data migration effort	25%
Finding/developing skilled technical resources	25%
Gaining management support	17%
Maintaining security and policy compliance throughout the migration	17%
Controlling/documenting changes	13%
Other	4%

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