

**M-Files®**



# Remote Working Document Management Benchmark Report

Are Companies Prepared to Deploy a Remote Workforce?



## INTRODUCTION

The current business environment has caused many organizations to deploy a remote workforce. While efficiency and productivity have always been a priority, the developing situation has elevated these concepts to the forefront and may fundamentally change many aspects of how businesses operate. Companies have had to figure out how to enable staff to bring the office work experience home with them — ensuring access to critical documents, no matter where they are stored. By empowering knowledge workers to work the exact same way at home as they would in a physical office, productivity and efficiency are maximized, and business continuity is never at risk.

But remote working is not a new phenomenon. Owl Labs reports that, globally, 52% of workers work from home at least once every week. Based on remote workers statistics from 2018, more than half of the world's employees already enjoy the benefits of the flexible workplace and it's unlikely that this number will decrease anytime soon. Especially given that recent data from FlexJobs shows that 65% of people think they work best at home.

Nor is remote working a temporary phenomenon. The current circumstances put many companies in a precarious position, forcing them to deploy a remote workforce quickly. But this may indeed be an inflection point where, even after these events subside, workers will continue to stay home to work in increasing numbers. Companies will likely find value in a flexible workforce, freeing up resources normally reserved for running and maintaining a brick-and-mortar office space.

In a recent study, IDC revealed that the unproductive time workers spend as a result of information management inefficiencies amounts to a loss of 21% of the organization's total productivity, which costs the organization an astounding amount — nearly \$20,000 per worker per year.<sup>1</sup>

The data in this whitepaper was compiled from a research project commissioned by M-Files to better understand how companies across the globe are managing their growing store of company information. With resounding clarity, the consensus is that document management, as a whole, remains a challenge — but especially for remote workers.

## Document Management for an Increasingly Remote Workforce

While intelligent information management (IIM) encompasses so much more than the catch-all term of 'document management', a core functionality of any IIM platform is the ability to store, manage and track documents. Furthermore, any IIM platform should provide for the ability to manage company information offsite the same way workers would while at the office.

When evaluating remote capabilities of a document management system, there are several features to look for. The most prevalent is access to your data anytime and from anywhere. As people are working remote with increasing frequency, workers demand instant answers while on the move — things like client details or notes, A/R Balances, invoices, HR paperwork and everything in between. Ensuring that a document management platform's remote working enablement supports workflows is also important, making it easy to review and approve documents and complete assigned tasks.

But how prevalent are challenges related to managing information away from a physical office space? This report drills down to the heart of remote document management, surfacing statistics on how organizations in nine different countries are managing company information and how they are facing the challenges presented by their ever-increasing store of data.

## WORKING REMOTELY WITH COMPANY DOCUMENTS

Information at every company is growing — the quantity of documents, version control and various data stores all present unique problems and no two tactics for document management are the same. Now attempt to take those challenges away from the office with some version of mobile document management and the issues compound.

It sounds so straightforward: access, store and manage documents from the cloud and work with them the same way, anywhere you happen to be. Most believe this should be easy for all workers, but many technologists have tried to tackle the issue with some success yet challenges still remain.



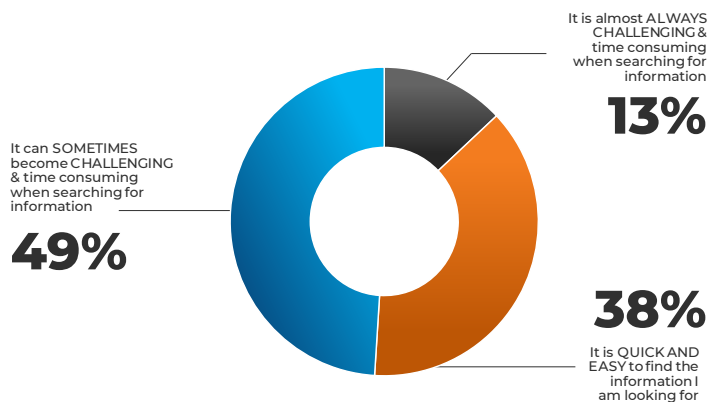
## ACCESSING DOCUMENTS WHILE WORKING REMOTELY

The most elementary of all document management functions is the ability to access documents — to retrieve them from wherever they may be stored. Increasingly, the ability to access information away from the office is becoming more and more important as remote workforces continue to grow.

Work is increasingly becoming a thing you do rather than a place you go. The modern worker demands efficiency of information access to work remotely. Companies can realize massive efficiency gains by enabling staff to work with critical information from anywhere, anytime, on any device. How simple is it for workers to search and retrieve documents when away from the physical office location?

When it comes to searching repositories/systems for documents and information while working remotely, what is your general experience?

The vast majority (81%) of respondents report that they need access to corporate documents and information away from the office with only 38% of these respondents reporting that it is quick and easy to find the information that they are looking for.

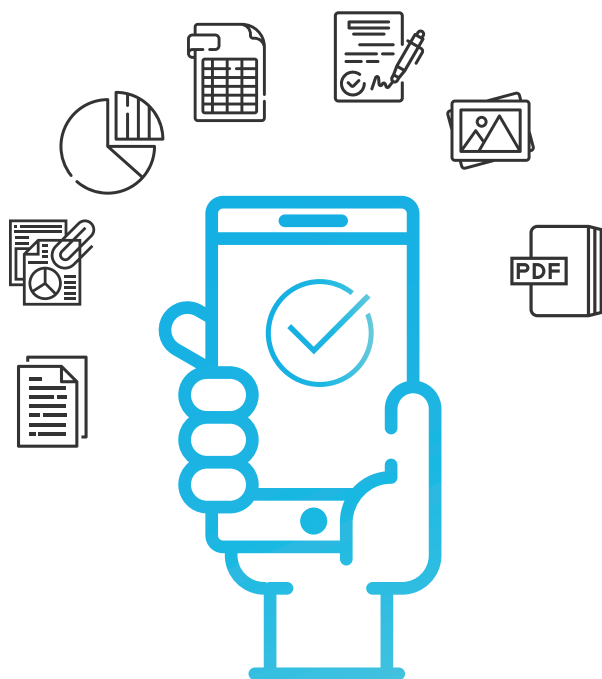


**62%** of workers find it sometimes or always challenging and time-consuming when searching for documents when working remotely.



Many business workers utilize more than one device for work and personal use. They need a simple and secure way to access files from each of those devices without having to save a local copy on each one. And it's not just access. People need to be able to work normally — as they would if they were in the office. They need to have the same working experience at home as they would at the office.

Sharing, editing, approving and signing documents are all critical capabilities when working remotely. Providing access to information from any device, anywhere unlocks tremendous productivity. But to what extent can remote workers experience the same information environment at home as they do at the office?



We asked survey participants:

Using the systems/tools provided by your company, which of the following are you currently able to do while working remotely?

Of those respondents who need to access corporate documents and information away from the office, 43% cannot access company documents and files and 54% don't have the ability to share or collaborate on documents (46%).

One in ten (10%) respondents report that they can't do any of the actions using the systems/tools provided by their company.

Given the high percentage of respondents (81%) reporting that they need to access corporate documents and information working remotely, addressing this functionality gap is key to the success of mobile document management.

**Only 45%**  
**of workers can edit documents**  
**on a mobile device.**

# PROCESS

## REVIEWING, APPROVING AND SIGNING DOCUMENTS

From invoices to service agreements to internal documents and everything in between, document workflows are irrevocably linked to the ability to review, approve and sign documents. How often do employees find themselves having to print a document, sign it themselves or get it signed? Pretty often, it seems and thus should become an integral component of document management in the context of digital transformation.

What challenges do you experience when it comes to reviewing and approving documents and information?



Two-thirds (66%) of respondents indicate that they experience challenges when it comes to reviewing and approving documents.

While the digital workplace of the future is one that provides for anywhere access to documents from anywhere, 20% of workers still don't have access to documents and information needed to review and approve working remotely.

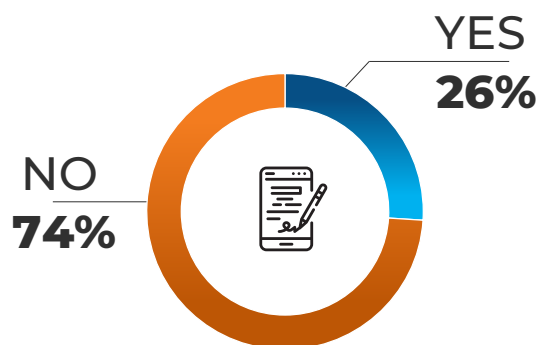
With only 18% of respondents stating that they don't tout any major issues in document approval processes, organizations are clearly experiencing a range of challenges when it comes to reviewing and approving documents including areas such as efficiencies, notifications, and access. Realistically these are challenges that should not be too difficult to overcome but can all-too-easily have negative financial and productivity implications.

**Nearly two-thirds of respondents (65%) indicate that they experience challenges in reviewing, approving and signing documents.**

## 3 ABILITY TO APPROVE DOCUMENTS ON A MOBILE DEVICE

With the paradigm shift to an increasingly remote workforce comes the necessity to enable mobile workers to complete critical tasks — like reviewing and approving documents. Although sufficient technology exists to make that a reality for most, progress seems a bit slow in mobile signature enablement.

Are you able to sign corporate documents remotely from a mobile device, when needed?

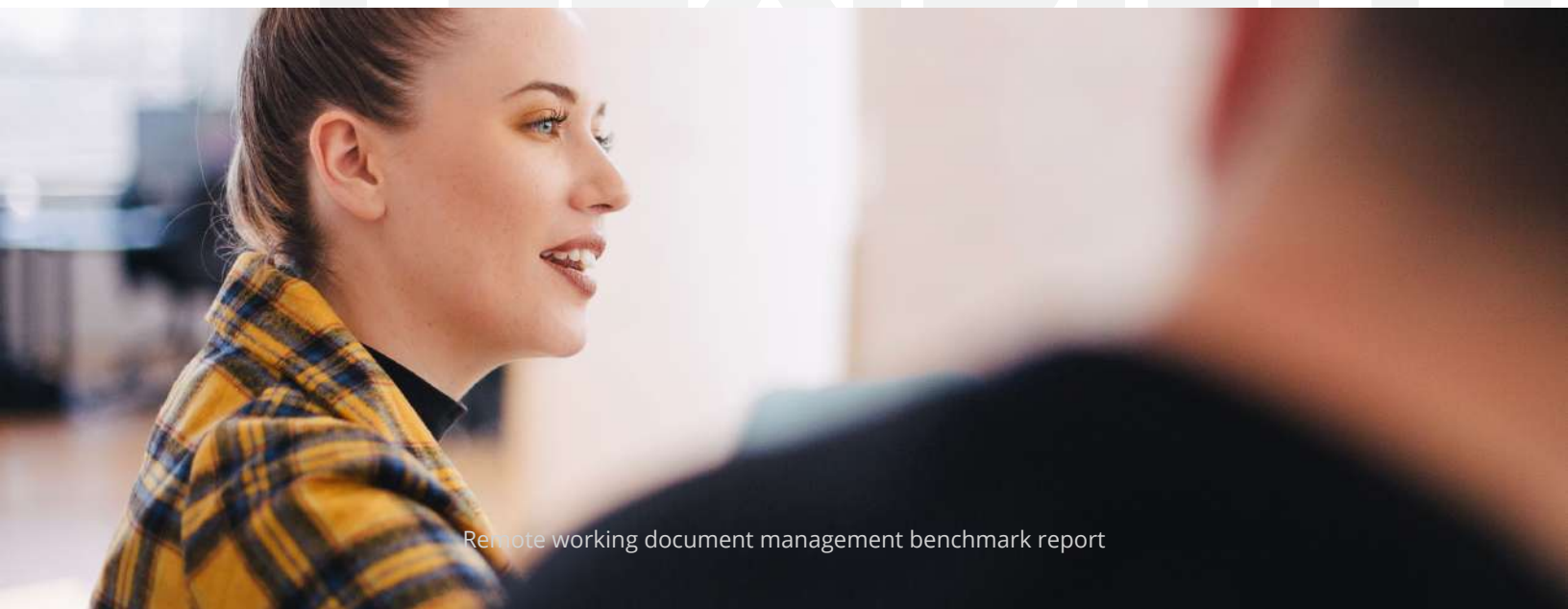


Only 26% of those respondents who need access to corporate documents remotely using a mobile device report being able to sign documents using such a device.

The survey provided a follow-up question to the challenges experienced when it comes to reviewing and approving documents. When asked to identify the action workers were missing that would be the most likely to benefit them, the ability to sign documents remotely from a mobile device was cited most at 39%.

*Just **65%**  
report that they can sign  
documents remotely from  
mobile devices.*

# FLEXIBILITY



## USE OF PERSONAL DEVICES AND FILE-SHARING APPS

As many IT departments struggle to keep up with yearly technology changes and disruption brought on by global events, company employees increasingly want to use their own devices to access and share corporate data. It's part of a growing trend dubbed Bring Your Own Device (BYOD). This trend is often paired with file-sharing apps — like Dropbox, Box or Google Drive — to enable workers to pass files and documents between one another. But the advent of BYOD and file-sharing apps has brought with it a new set of concerns — not the least of which are lack of monitoring and security and loss of full data control.

The survey asked respondents:

**Do you use your own personal device and/or file-sharing apps to access and share company information?**

### Company-Sanctioned Use of Personal Devices and File-Sharing Apps

Over six in ten (61%) respondents report that they use personal file-sharing apps and/or their personal device to access and share company information.

It all alludes to mounting concern with shadow IT, where information technology is managed outside of (and without the knowledge of) the company's IT department. An Avanade survey reports that "one-third of tech purchases in a company are made by people who don't report to the CIO."<sup>6</sup> Employees bringing in consumer grade products opens up a host of problems for a company. In fact, 96% of Americans surveyed see employee negligence, such as user low-security products or infected removable storage media, as a contributor to data breaches.<sup>7</sup>

Organizations should be keeping a keen eye on employee use of personal devices and file-sharing programs and regulating it where necessary to limit any unnecessary security concerns and breaches. Taking it one step further, many employees are using their own mobile devices and turning to these apps because their company doesn't offer a suitable alternative. With robust document management systems that provide mobile information management capabilities, organizations could potentially mitigate these risks entirely.

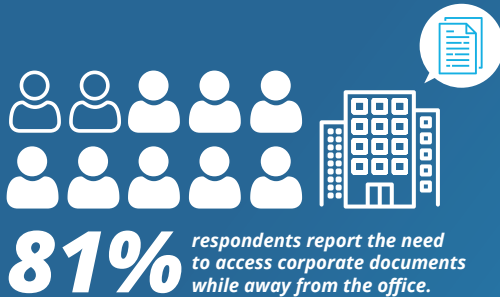
In the context of shadow IT, the use of personal devices and file-sharing apps to access and share company information is a practice that is, in recent years, been scrutinized by organizations. Companies are realizing that BYOD and file-sharing open the organization to IT-centric challenges like a lack of change management and data security.

Of respondents who use their own personal devices and/or personal file sharing apps to access and share company information, large proportions report that employees are officially permitted to do so (personal devices – 83%; personal file share apps – 81%). However, the use of personal devices and file-sharing apps is discouraged in 38% and 33% of respondents' organizations respectively.

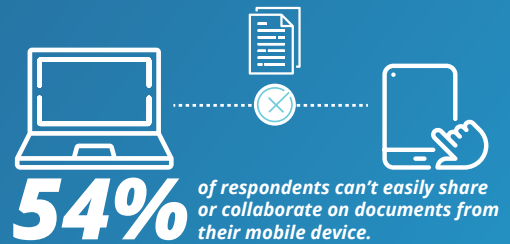
5% of respondents admit to not knowing if they are officially permitted to use their personal devices to access and share company information and 5% admit the same for personal file sharing apps. Given the strict data protection rules which are currently being enforced around the world, organizations could be exposing themselves to unnecessary risk



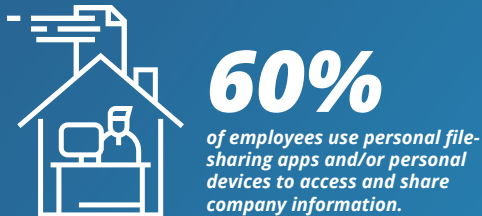
# MOBILE DOCUMENT MANAGEMENT RECAP: BY THE NUMBERS



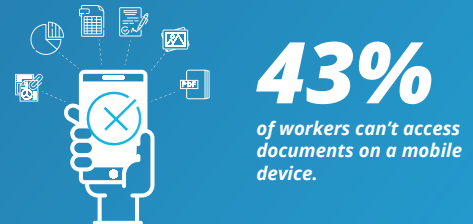
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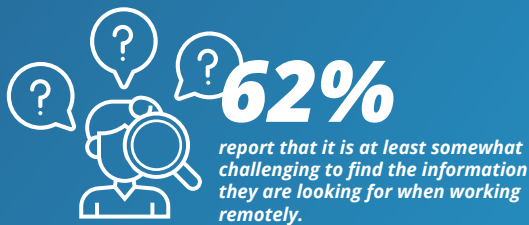
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## About CIMS

Casto Information Management Systems, a Global Technology Solutions Company was founded in 1996 and is owned and operated by founders, Ron and Connie Casto. For more than two decades, CIMS has been a leading full-service document management solutions provider delivering document management, business process workflow, paper and e-document capture, forms processing using OCR, ICR, and Mark Sense recognition, Accounts Payable automation, case management (DCM), robotic process automation (RPA), and ISO 9000 solutions. CIMS uses tested, proven, and scalable software tools to leverage technology that delivers complete turnkey solutions, that improve productivity, enhance collaboration, and reduces manual labor.



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