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An ECM Industry Trends White Paper

**The Value of  
SharePoint-based  
ECM Solutions**



Clearview

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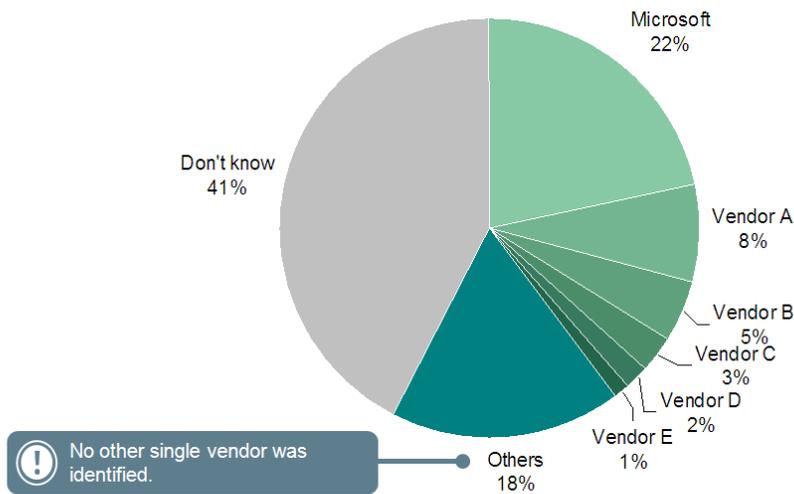
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## Background

The year 2007 has been recorded and archived into our history books. In the technology sector, it was quite a year and no recent activity has generated the relevant phenomenon that Microsoft® SharePoint® has created within the Enterprise Content Management (ECM) community. While virtually every ECM vendor with some market presence or name recognition has announced its “integration” with SharePoint, there have been few to adopt SharePoint as a cornerstone of their ECM platform. With SharePoint’s rich and deep inventory of ECM functionality designed to meet the business needs of the masses, customers seeking out and evaluating SharePoint-based ECM solutions will clearly become a pervasive business trend in 2008—and beyond. This is already evidenced in early surveys of anticipated buyers of ECM solutions.

### ... driving greater interest in Microsoft and other “platform” vendors

“In which vendor’s content management software will you invest?”



Base: 216 packaged application decision-makers

Source: “Enterprise Content Management Alive and Kicking in 2008”, Forrester Research, Inc., November 2007.

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## **SharePoint's Attractive Cost Promotes Widespread Adoption**

One clearly compelling interest in SharePoint for ECM deployments is the perceived attractive cost model. While there is still some confusion about SharePoint being "free" (Windows SharePoint Services is incorporated into the licensing of Windows Server 2008), even the more costly Microsoft Office SharePoint Server (MOSS) creates a very wide price differential between it and traditional ECM product license costs. Of course, it is important to keep in mind that license is only one part of the total cost of ownership—the services required to create an ECM solution from scratch on top of the SharePoint base platform can be sizable given that it is a platform and not an "out-of-the-box" ECM solution.

Next-generation SharePoint-based ECM solutions provide organizations with similar license and associated services costs savings over traditional ECM products, while providing rich and valuable extended functionality for enterprise-class associated content services on top of the SharePoint platform. With these new and attractive license and pricing models, companies can now afford to adopt ECM across the entirety of the business enterprise.

## **Extending SharePoint to Complete the "ECM Stack"**

With rich and deep functionality introduced in the 2007 edition of SharePoint, one can extrapolate that SharePoint's ECM capabilities are founded on and central to content generated largely by Microsoft applications. This is substantiated from the excellent Document Management, Forms Management, Web Content Management, and Email Management services (or "ECM sub-capabilities") delivered in SharePoint 2007. Yet noticeably absent are core ECM functionalities such as Document Scanning and Imaging, Report Management (COLD), and enterprise-class Business Process Management (BPM). Microsoft very publicly directs customers to leverage Partner-built solutions around these specific ECM components or focused Content services (such as Document Imaging), to fill any functional disparity in the solutions delivery.

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Modern SharePoint-based ECM solutions take this one step further by providing a comprehensive and highly-unified ECM suite built upon SharePoint that delivers complete ECM functionality (also known as the “ECM stack”) and management for all forms of business content. SharePoint-based ECM suites further extend SharePoint’s native ECM attributes with rich, enterprise-class transactional content attributes like Document Imaging along with high-value services like Advanced Content Lifecycles, Unified Policy Administration, Central Audit Logging and Reporting, and Intelligent Content Organization—all features normally associated with much more costly ECM solutions.

### **A Natural Evolution and Attachment to the SharePoint Portal**

SharePoint originated as Microsoft’s portal platform to provide Microsoft customers with a robust application platform that seamlessly fits into and integrates end to end with the Microsoft IT infrastructure and information worker desktop.

Portals are largely recognized for creating highly collaborative environments via intranets and extranets, and connecting people to information at the right time and place. As portals and collaboration evolved, the need to support content as a part of the portal realm enabled collaboration on and around content (business information) or collaboration supported by the content itself.

SharePoint-based ECM suites have a unique opportunity to add ECM applications and services to the existing SharePoint portal platform deployments, yielding higher returns and enhanced operational value beyond the anticipated returns projected solely for the portal investment. Additionally, the natural extension of content applications and services via the portal application allows organizations to leverage the portal platform for higher-value application and operational benefits while maintaining the Microsoft-familiar user experience for all deployed applications.

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## **The Perfect Fit within the IT Infrastructure and the Desktop**

True SharePoint-based suites provide a most compelling case for the appropriate and sound fit within the modern business IT environment. With Microsoft's substantial presence on corporate desktops and inside the IT infrastructure, it is easily understandable why the utilization of SharePoint functionality for ECM solutions is attractive to Microsoft-centric organizations. Since SharePoint is tied to both the Operating system and the Microsoft SQL Server while elegantly integrated into the desktop Microsoft Office suite, the brilliance of Microsoft's vision for SharePoint is clear. The connectivity benefits it will provide to other Microsoft server applications and infrastructure technologies will continue to evolve and will only further enhance the value derived by Microsoft customers.

## **User Adoption via the Familiar Microsoft User Experience**

While cost can be a limiting factor to broad organizational adoption of legacy ECM solutions, the usability or classic "ease-of-use" has also caused many ECM deployments to fail. This is attributed to the complexity and cumbersome nature of legacy ECM systems not being designed for the modern information worker (end user). With Microsoft Office 2007 and SharePoint 2007, Microsoft has delivered rich ECM functionality seamlessly woven into the fabric of Microsoft's desktop applications. These capabilities along with future Microsoft ECM functionalities embedded into the desktop will undoubtedly become the *de facto* standard for content and collaborative ECM process functions. This will drive a significant and painful divide between the organic functionality historically developed by legacy ECM vendors and the new Microsoft-associated standards for ECM functionality being continually introduced onto the desktop.

By leveraging contemporary SharePoint-based ECM suites, the familiar Microsoft interface and user experience is carried elegantly from the authoring applications and information worker applications, and will continue throughout the associated content lifecycle within the ECM content application itself. The Microsoft familiar experience and associated intuitive interface promote rapid user acceptance and broaden the successful adoption and deployment rates that can be experienced around the ECM suite implementation.

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## **The New Wave of SharePoint-based ECM: Beyond “Integration”**

Responding to the tidal wave of interest around SharePoint within the ECM software community, legacy ECM vendors quickly introduced their SharePoint integration. Virtually every integration announcement has been a “co-existence” approach that does not provide incremental value or aggregate business enhancement to justify the maintenance and continued usage of a legacy ECM product.

SharePoint-based ECM solutions extend native SharePoint functionality with the added value of transactional Document Imaging, Report Management, and BPM, along with enterprise-class Unified Policies and Content Services rivaling the recognizable, yet older and costly names in the ECM industry. They also deliver Microsoft-only functional experiences around native SharePoint capabilities such as Document Management, Forms Management, Email Management and Web Content Management, with enterprise-wide standard functionality and consistency.

There is little doubt that SharePoint will raise the bar for the ECM community and it will raise the associated value that consumer organizations will reap from emerging SharePoint-based ECM suites. The savvy IT executive or business manager who explores SharePoint-based suites for ECM strategies will find that they can achieve enhanced business content control and management, broaden user adoption across the enterprise, and enjoy higher, longer-lasting returns on their ECM investments. This can all be achieved while minimizing the impact on both the information worker desktop as well as the internal IT operational infrastructure. This is the value that users of SharePoint-based ECM suites will experience in 2008, and well into the future.

### **An Invitation**

Clearview would like to extend a special invitation to you to take a closer look at our unique SharePoint-based ECM suite. Our suite is built exclusively upon and for the modern Microsoft technology platform, and delivers full, enterprise-class ECM functionality that extends and complements the native ECM capabilities of SharePoint 2007.

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Clearview provides a full suite of rich, enterprise-class ECM functionality including Document Imaging, Document Management, Report Management (COLD), Email Management, Web Content Management, and Workflow/BPM—combined with high-value Unified Content Services such as Advanced Lifecycle Management, Retention Services, Compliance Monitoring and Reporting Services, along with strong security controls and audit tracking.

Clearview's entire suite of functionality is innovatively delivered to information workers via intuitive and unique user experiences designed to make content relevant to roles, workers, and functions while continuing the familiar Microsoft desktop environment and experience.

We invite you to take a closer look at Clearview. You'll quickly see the difference.

*"Microsoft is excited to have Clearview, our ISV partner, bring to market their innovative utilization of SharePoint as a key component of their ECM suite. Clearview ECM delivers on the Microsoft vision that our partners can leverage SharePoint as a platform along with its core content services to build next-generation ECM customer solutions."*

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