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# How are businesses using Microsoft® SharePoint® in the Enterprise? Market Survey 2010

### EXECUTIVE SUMMARY

Global 360, a leading provider of business process and document management solutions, conducted a survey through August 2010 regarding Microsoft SharePoint. 886 people familiar with SharePoint from multiple industries worldwide participated in the survey. The goal of the survey was to:

- » Determine the breadth and depth of SharePoint usage in the market today
- » Understand how companies are driving value out of their implementations, and
- » Identify challenges related to their investment

### SHAREPOINT ADOPTION RATE REVEALS INDUSTRY DOMINANCE

SharePoint clearly revealed its industry dominance in the survey. While the vast majority of survey respondents (90%) currently use SharePoint, the survey found the targeted adoption rate should reach an overwhelming 97% of organizations. Furthermore, 67% of the respondents answered that they had deployed SharePoint “enterprise-wide”, pointing to its wide acceptance beyond ad-hoc departmental deployments and into the masses of business users.

### SHAREPOINT USE INDICATES DESIRE TO LINK CONTENT WITH BUSINESS PROCESSES

While most people start with SharePoint as a portal technology or use it as a content repository, survey participants revealed that over half of their organizations have extended its use to manage document workflows (67%) and support business processes (56%) – a trend that will continue to grow now that SharePoint 2010 is enterprise capable. The survey also reported 27% of organizations utilize over half of the documents stored in SharePoint to support mission-critical processes, further evidence of the desire to link SharePoint’s content to business processes.

### SHAREPOINT DEPLOYMENT CHALLENGES

Deploying SharePoint does come with its share of challenges. Despite its widening use cases and increasing strategic value, the survey found only 17.6% of organizations reported that SharePoint user experience was great and adequately met their needs, while 78% found the SharePoint user experience inadequate.

Development time and effort required to build business applications was ranked as the top challenge (30%) for organizations deploying SharePoint. Respondents were also challenged by the lack of intuitive, easy-to-use SharePoint-based interfaces for business users (21%).

### SHAREPOINT STRATEGIC VALUE CONTINUES TO INCREASE

With its near ubiquitous adoption and increasing use by lines of business, the survey results reveal that SharePoint is certainly poised for a long stay in the enterprise. As organizations increase their expertise and extend SharePoint with intuitive, out-of-the-box third party applications for business users, its strategic value will continue to increase. Survey participants also touted new SharePoint 2010 features such as improved workflow management, application development environments, and content search – pointing to Microsoft’s success with educating the market about the platform’s extended use beyond portals and content management alone. Furthermore, adoption of SharePoint 2010 looks strong with over 8% of organizations revealing that they have deployed this newly released version.

Learn more about our survey participant’s experiences with SharePoint’s use, value, and challenges throughout this paper. Then compare their responses with your own organization.

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## SURVEY FINDINGS

### ADOPTION OF SHAREPOINT

Roughly 90% of the survey respondents stated that they own and use SharePoint today, pointing to SharePoint's growing popularity in today's enterprise. Even among the 10% not using SharePoint today, 36% of them already own it but have yet to deploy it, followed by another 43% of them that are considering a future deployment. SharePoint's wide adoption in the enterprise was certainly helped along by its free client version, but most organizations surveyed have transitioned to full license versions of the software.

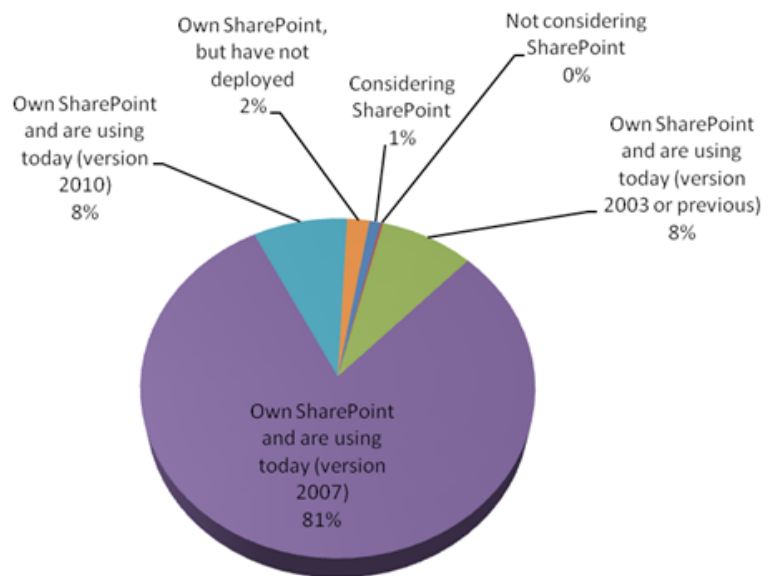


Figure 1

Are you currently using or considering using SharePoint within your organization?

The survey results revealed that SharePoint could see enterprise adoption rates as high as 98%. This finding is supported recent analyst reports<sup>1</sup> touting annual growth of SharePoint server licenses from 25 – 31% annually over the next four years. Although the vast majority of SharePoint deployments are based on the 2007 release (80.3%), the survey also revealed 8.3% of respondents had deployed SharePoint 2010. The quick adoption rates of SharePoint 2010 were further confirmed in a recent Association for Information and Image Management (AIIM) study<sup>2</sup> that reported 13% of organizations were planning an immediate upgrade to the 2010 release, with half upgrading within a year.

## WIDESPREAD DEPLOYMENTS

Of the 90% of organizations using SharePoint (see “Adoption of SharePoint” section), many are showing wide acceptance of the software across their business. The survey results revealed that 67% of respondents indicated SharePoint has been deployed enterprise-wide. Further reinforcing this finding, a July 2010 survey<sup>3</sup> conducted by Colligo Networks Inc. revealed similar results with 73% of companies with greater than 5000 employees had deployed SharePoint enterprise wide.

When coupled with deployments spanning several departments (17%), the percentage of moderate to large deployments stands at almost 84%. With SharePoint gaining greater penetration into lines of business through its collaboration and business process management related roles, it is not uncommon to see deployments covering over 100 geographical or team sites in a large enterprise.

**Figure 2**  
*How widespread is SharePoint in your organization?*

How widespread is the deployment and usage of SharePoint within your organization?	
	Percent
Use within team or single SharePoint project site	4.94%
Limited SharePoint sites or departmental use (1 to 3)	11.03%
Several departments (4 or more)	16.98%
Enterprise-wide deployment of SharePoint	67.05%
<b>Total</b>	<b>100.00%</b>

Although wide spread adoption was seen across all industries, participants from the Manufacturing vertical demonstrated the highest rate of enterprise wide deployments at over 88%. At the other end of the spectrum, respondents in Insurance and Government organizations reported enterprise wide deployment in 42% and 50% of their environments, respectively.

With such broad acceptance across the enterprise, it is clear that SharePoint has reached beyond IT departments and is extending more and more value to business users. The collaborative nature of SharePoint deployments continues to accelerate its penetration into the enterprise and outside of protected IT-only environments.

### USING SHAREPOINT FOR PORTALS, WORKFLOW, AND PROCESS MANAGEMENT

Businesses that once viewed SharePoint as the “go to” place for content are extending its role into “the place where business gets done”. The survey allowed participants to provide multiple answers to how SharePoint was being used in their businesses. Even though portal and content management ranked highest at 66%, the ability to manage content in the context of a business process was seen in over half of the organizations surveyed. Now that SharePoint 2010 is enterprise capable, it should be anticipated that more organizations will build and customize business applications leveraging their SharePoint infrastructure.

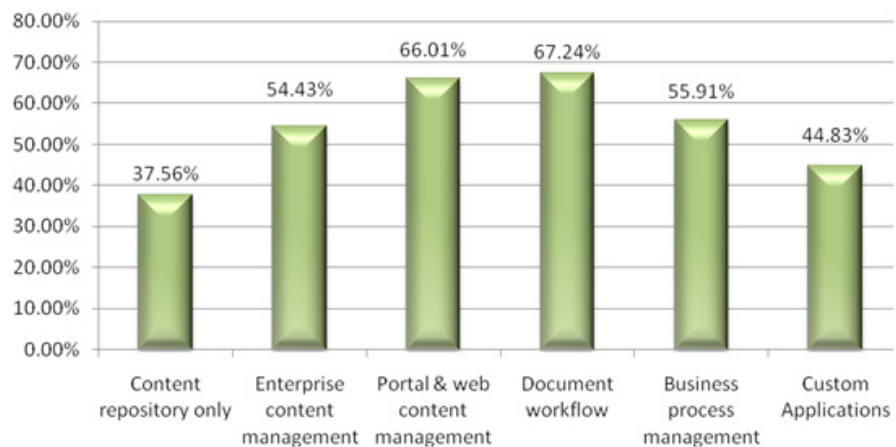


Figure 3

*How are you currently using, or plan to use, your SharePoint investment?*

The increasing use of SharePoint to manage document workflow (67%) and business processes (56%) provides evidence that SharePoint is moving from a static content repository to a platform that actively connects people and content through processes. Further support of the interest in enabling workflow was seen in a recent survey by The Michael Sampson Company<sup>4</sup> where over 53% had already deployed process workflows.

Interestingly, 21% of respondents stated they had already implemented a Business Process Management Suite (BPMS) leveraging SharePoint, while 56% of respondents stating they are using or planning to use SharePoint for BPM. The link between SharePoint and BPM should not be a surprise to many organizations, as improving business processes ranks as the top CIO priority in 2010 according to

a recent Gartner report<sup>5</sup>. Further reinforcing the importance of business process management and SharePoint, a recent AllM survey revealed that over 60% of SharePoint deployments would take advantage of BPM within the next 18 months. The same report named BPM as the leading 3rd party application tied to SharePoint deployments<sup>6</sup>.

A March 2010 Forrester report<sup>7</sup> provides more evidence toward this linkage, stating “When developers build process-oriented applications that leverage Windows Workflow Foundation (WF), they often find themselves hard-coding static, brittle interfaces that add to the total cost of ownership (TCO). To use SharePoint 2010 as part of an enterprise-wide BPM strategy, customers must add a comprehensive, SharePoint-oriented business process management suite (BPMS), which will raise vendor license costs, but lower overall TCO and risk.” Clearly, with larger and larger SharePoint deployments out there, the more costly custom code will be to support those organizations.

### CREATING AND MODIFYING SHAREPOINT WORKFLOWS

The survey found over half (55%) of the respondents are modeling their business processes in Visio prior to or in parallel with configuring the workflow using SharePoint Designer or Visual Studio, while 9.7% were using business process analysis (BPA) or BPM tools to model a process.

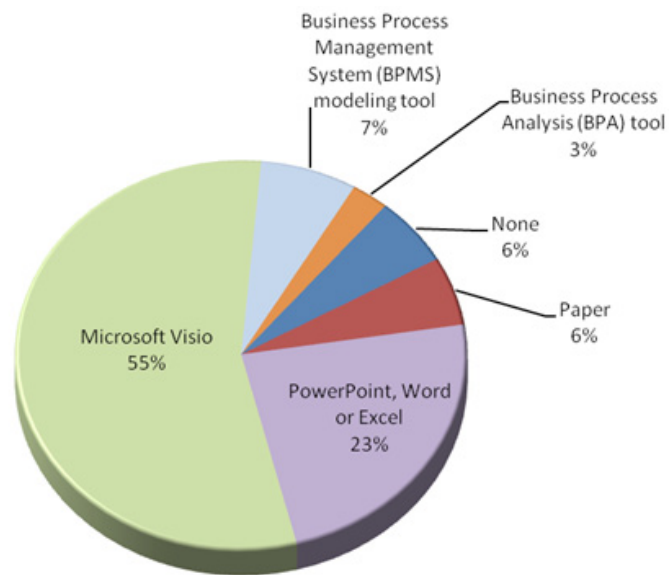


Figure 4

*What tool does your organization primarily use for modeling/mapping existing or new business processes?*

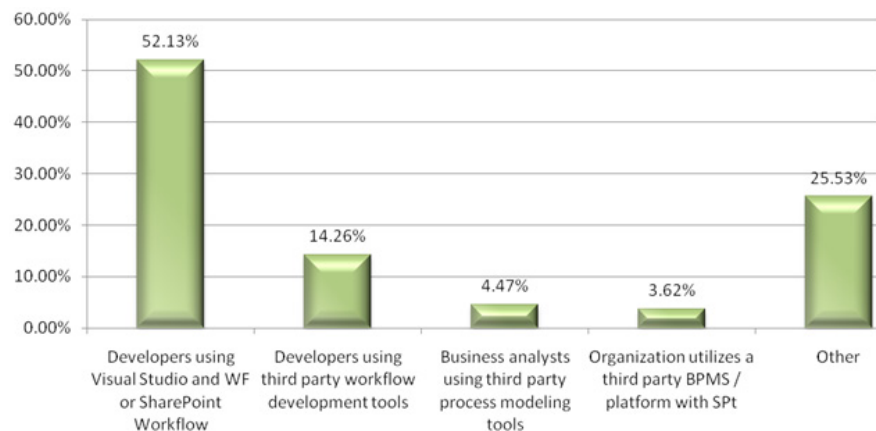
With the introduction of Visio 2010, the domination of Visio as a process modeling tool is likely to continue. Relatively simple processes can now be mapped in Visio 2010 and transferred into SharePoint Designer 2010 – expediting design and deployment of process workflows.

For more complex processes, Visio 2010 Premium now provides native BPMN modeling stencils that are compatible with many leading BPM Suites offering process automation and management. New plug-ins<sup>8</sup> for Visio Premium now allow BPMN process models to be shared with BPM Suites using the industry standard XDPL exchange protocol.

IT users can easily create workflows in SharePoint as evidenced by the 52% of participants already using native SharePoint workflow design tools. SharePoint workflow is often used for remedial process tasks such as leave requests, budget approvals, and other not particularly complex solution. Often, when organizations look for compliance guardrails on a process or need to track paper trails on a document, SharePoint workflow is used.

As organizations become more comfortable with implementing SharePoint workflows, many have been surprised at the cost of custom development to support them – especially where workflows are tied to more complex processes. The need for maintaining workflow code is more apparent when end-users begin to interact with the workflows and demand more customization to suit their needs as business demands change.

Figure 5  
What practice is used to create/modify SharePoint workflows?



Faced by the functional limits and cost associated with up-keeping the custom code, the survey showed that 22% of organizations have moved away from the native SharePoint WF tools and adopted 3rd party solutions to supplement the workflow and business process management functionality. Organizations looking for alternatives to SharePoint workflows are turning to process modeling tools and Business Process Management Suites (BPMS) to get a better handle on the processes themselves. BPMS's are appropriate for organizations seeking improved lifecycle management of process, historical and real-time process analytics, robust process modeling, improved process automation with strong exception handling, etc.

The flexibility of business process management technologies to handle more complex process scenarios is further explained by recent Forrester research stating, "Generally, the model-driven approaches found in BPMS's are far more flexible, allowing the organization to deal with those scenarios where unforeseen exceptions effectively invalidate the process description (developed beforehand). This limitation is a critical problem for products that extend the underlying SharePoint process capability (WF). While these products may look a lot easier to use (to the uninitiated), they are still biased toward relatively simple procedures by the underlying capabilities of WF"<sup>9</sup>

The chart below provides a comparison of capabilities between SharePoint and process platforms like a BPMS.

SharePoint Out-of-the-Box	Process Platform Capabilities
Static Interfaces	Work moves across processes, with no loss of context
Workflow withing single site collection	Cross-organization workflows and processes
Simple, single workflow paths	Parallel processing
Limited workflow variability	Roll-back, routing back to previous workflow steps or "approvers"
Scalability limitations	Ability to scale platform for highest transaction volumes

**Figure 6**  
A comparison of SharePoint vs. Process Platforms

BPM Suites are used for processes like mortgage loan origination, employee on-boarding, order-to-cash processing, claims processing, and handling exceptions

from supply chain management, where simple workflow management will not meet the needs of the line of business users or constrains how people typically interact with the process.

**MISSION-CRITICAL PROCESSES AND SHAREPOINT DOCUMENTS**

It was surprising to learn that nearly 27% of survey participants claim that over half of the documents stored and managed with SharePoint are supporting mission-critical business processes. With the increasing importance of documents being stored in SharePoint, more attention will have to be paid to organizing, managing, and protecting those assets.

An average company with 1000 employees generates over 7.2 million pieces of paper in one year. Organizations are clearly motivated to move paper-based content into a digital, secure shared environment, while keeping costs under control. Paper is an expensive habit. The cost of managing each sheet can reach 31 times the purchasing cost of paper<sup>10</sup>. To reduce this cost, many organizations are coupling scan and capture applications to drive content in a managed fashion into SharePoint faster, reducing the cost of managing their paper 3x<sup>11</sup>.

**Figure 7**  
*What percentage of documents are used/ accessed as part of mission-critical process?*

Of the documents stored and managed within your SharePoint repository, what percentage are used or accessed as part of a broader mission-critical process?	
None	10.81%
1-25%	38.47%
25-50%	23.92%
50-75%	17.72%
75-100%	9.08%
<b>Total</b>	<b>100.00%</b>

As SharePoint continues to capture more of the strategic content in enterprises, survey responses pointed to evidence of organizations phasing out more costly Enterprise Content Management (ECM) solutions, where annual maintenance costs can exceed the price of SharePoint licenses alone.

## CHALLENGES WITH SHAREPOINT IMPLEMENTATIONS

SharePoint initiatives have dramatically improved the productivity of organizations in managing content, offering simple portals for collaboration, and helping direct process workflows from one user to the next. But the gap between what has been delivered and what can be achieved is still dramatic.

The survey found that 17.6% of organizations felt SharePoint delivered a great out-of-the-box user experience and adequately met their needs. But, the strong majority of organizations (77.9%) described SharePoint as somewhat adequate to inadequate, and requiring additional in-house design and development.

51% of the organizations surveyed commented on the extensive development time required for building business applications and the lack of easy-to-use interfaces for business users. Many of these organizations are turning to online communities or third-party vendors. These communities and vendors are increasingly providing access to SharePoint web parts free-of-charge or natively within their business applications to reduce development time and improve the user experience with SharePoint applications.

In your opinion, what do you believe is the most challenging issue with your SharePoint implementation?	Percentage
Lack of intuitive, easy-to-use interface for business users	20.98%
Development time and effort required to build business applications	30.03%
Inability to manage multiple document workflows	3.74%
Limited real-time reporting and analytics on workflows or processes	8.76%
Inability to manage role- or skills-based work assignments	6.03%
Ability to scale for high volume of documents or users	6.03%
Other	24.43%
<b>Total</b>	<b>100.00%</b>

**Figure 8**  
*What is the most challenging issue with your SharePoint implementation?*

Among those that indicated they have developers using SharePoint WF and Visual Studio to create and modify SharePoint workflows, 32% said development time and effort required to build business applications is the biggest challenge they have with their SharePoint implementation.

### THE SHAREPOINT USER EXPERIENCE

The user experience is often the most underestimated component of success when deploying SharePoint and business applications that leverage its foundation. Organizations deploying generic user experiences can substantially increase their odds of failed implementations. Generic user experiences often result in slower user adoption, lower productivity by users seeking workarounds to applications that do not meet their needs, and higher costs to rollback and customize applications that did not meet initial expectations or adoption rates.

As mentioned in the previous section, nearly 21% of users saw the lack of intuitive and easy-to-use interfaces offered from SharePoint out-of-the-box as one of their biggest challenges with the platform. When asked specifically to rate user experiences, 78% of survey participants agreed that SharePoint is not completely adequate and could use improvements, while only 18% said it was adequate for their needs.

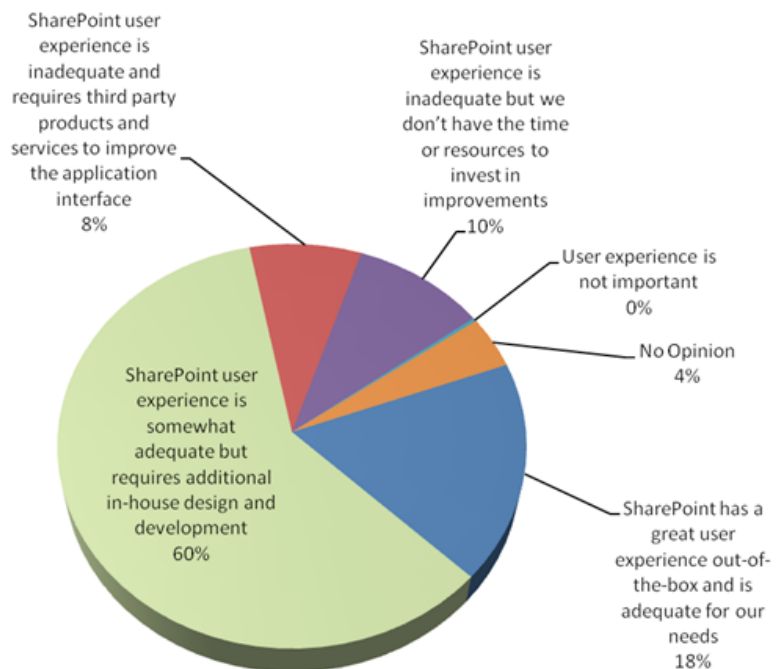


Figure 9  
Which best represents your opinion of the SharePoint user application experience?

Of the 60% of respondents who noted the SharePoint user experience as inadequate, 47% were building custom applications within their SharePoint environments. For organizations looking to reduce the time, resources, and expertise required for this customization, they should consider third-party applications that not only bring added value to their SharePoint implementations (e.g., business process management, business intelligence, content management), but also enhance the user experience by supplying out-of-the-box user experiences tailored closely to the needs of their users. Third-party applications that provide a development kit-like environment for building the user experience further exacerbate the challenges and increase costs of deploying and managing SharePoint environments.

Additionally, while planning, purchasing, or customizing SharePoint business applications, IT organizations should make a concerted effort to liaison with the business users targeted for the application. Involving users upfront in the design of and experience delivered by the target application will improve user adoption, improve productivity, and reduce maintenance costs.

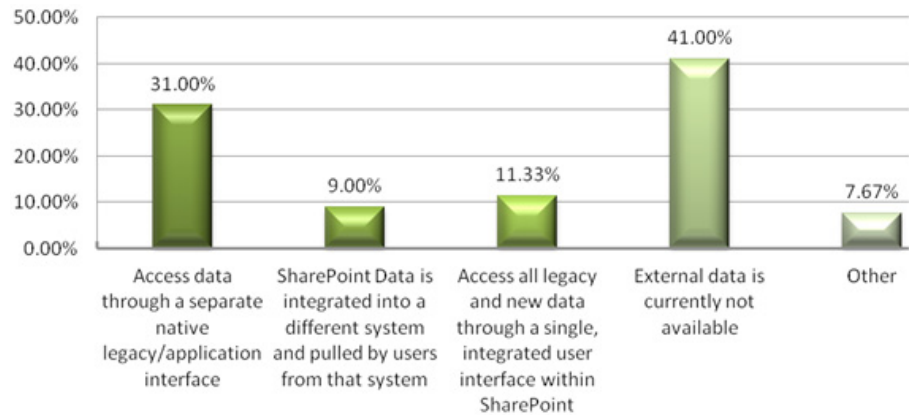
### **EXPOSING LEGACY OR OTHER APPLICATION DATA TO SHAREPOINT**

The gap between today's "access to some information" and the user's desire of "access to all information" is hampering productivity with SharePoint's increasing role as the place to do business. 72% of organizations said external data is not available to them through SharePoint. When data is available, they have to access it through a separate native legacy/application interface. Organizations will experience productivity losses when end-users have to switch between applications to do their work.

Application development teams working with SharePoint will need to realize that people want one business application to get all of their work done, in addition to their email application. With the enterprise readiness and bags of tricks offered by SharePoint 2010's broad functionality and partner applications, delivering that one business application experience can be a realistic objective for organizations.

Figure 10

How do you expose legacy or other application data to your SharePoint users?



Daily use of search engines like Google is placing vast amounts of information and content at people's fingertips. Additionally, people have increased availability of applications and gadgets (e.g., RSS readers, email portals, IM, news portals, etc.) in their personalized search engine pages or on devices like their iPhone. The increased convenience and speed of access to information in their personal lives is placing an increasing expectation on corporate infrastructure platforms like SharePoint to do the same.

For example, with easy access to mission-critical content being provided via SharePoint to support business process management initiatives, business users will be demanding increased access to other legacy or application data within the same user experience in order to help them get their work done. Recent industry research reveals that information and process workers might access as many as 14 different applications to complete their work.

Access to legacy or other application data will become increasingly important for SharePoint end users. Organizations choosing to use SharePoint as the place to do business will benefit greatly from increased user productivity resulting from the consolidation of application and data interfaces into a personalized application experience for business users.

## REFLECTIONS ON SHAREPOINT 2010

Excitement around the SharePoint 2010 release was certainly not centered on portal and content management capabilities alone. As the SharePoint installed base matures and extends its application of the platform, users are looking to improve links between content and the business users with improved workflows (15.4%) and taking advantage of new and improved application development features (13.5%) to ease development time and effort. To improve value for and alignment to line of business users, survey participants are looking forward to simplified integration of business applications and proprietary systems with their SharePoint environments.

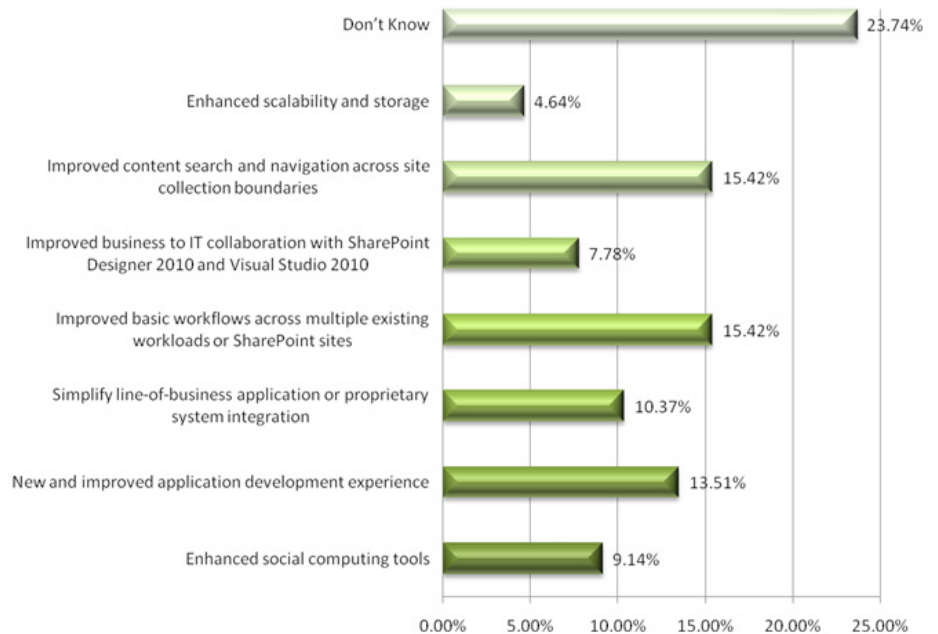


Figure 11

Which new capability within SharePoint 2010 do you believe will be most beneficial?

## CONCLUSIONS AND RECOMMENDATIONS

### BUSINESS VALUE OF SHAREPOINT IS GROWING

SharePoint is being adopted by an overwhelming majority of enterprises and is continuing to expand its footprint as part of the corporate infrastructure. As the base of SharePoint users grows and SharePoint 2010 delivers more enterprise capability, organizations are finding more ways to justify the increasing license and administrative costs by extending its value to the business. Organizations using SharePoint for traditional purposes of content management and portal interfaces will take advantage of its other enterprise-ready capabilities including business processes, collaboration, business intelligence, search, and 3rd party add-ons that further enhance its value.

### PROCESS EXTENDS THE VALUE OF CONTENT

Gartner surveys have revealed improving business processes as a CIO's #1 priority. It is no surprise that SharePoint deployments are gravitating toward this priority. As SharePoint expands its presence and holds increasing amounts of strategic content, business users are seeking more value from their interactions with the platform. Content is being connected with business processes to deliver increased value as SharePoint transitions from the place to go for content to the place to do business. With the increasing presence of SharePoint and the enterprise capabilities delivered in 2010, organizations should look to further extend the value of SharePoint by using it to deploy content-centric applications – especially where content is being linked to business processes. Organizations should also assess the cost and value of legacy document-centric applications to understand if SharePoint improves the overall cost of ownership.

### USER EXPERIENCE IS CRITICAL

Users are expecting more and more from their enterprise applications. Regular interactions outside of work with customizable, interactive application interfaces like iGoogle pages and Facebook are pushing IT organizations to deliver similar user experiences in the enterprise to meet user expectations. At the same time, IT organizations are challenged with the development expertise, time and cost to

build or customize application interfaces for business users through SharePoint or other enterprise applications. Companies should consider taking advantage of new capabilities delivered in SharePoint 2010 to further enhance their user's experience with the platform. Organizations should also employ 3rd party applications to lower their Total Cost of Ownership (TCO) and risk with SharePoint deployments, especially where those investments will dramatically improve end-user experiences, drive higher adoption rates, and reduce application development and maintenance costs.

### **EVALUATE YOUR ORGANIZATION**

Compare the survey participant's responses with your own organization. Use responses in this survey to gain a better understanding of how your organization's adoption of SharePoint compares to others. As you evaluate further deployments of SharePoint or migrations to the 2010 platform, continue to reference this survey to understand where more value can be realized across your own company.

## APPENDIX

### SURVEY BACKGROUND

The survey was taken by 886 individuals representing 50 industries. The dominant industries participating were Services (24%), Public Sector (19%), and Financial Services (12%). Survey respondents represented organizations of all sizes, with 67% of individuals representing firms with over 1000 employees. 72% of the participants were based in North America, while most of the other participants came from Europe (17%).

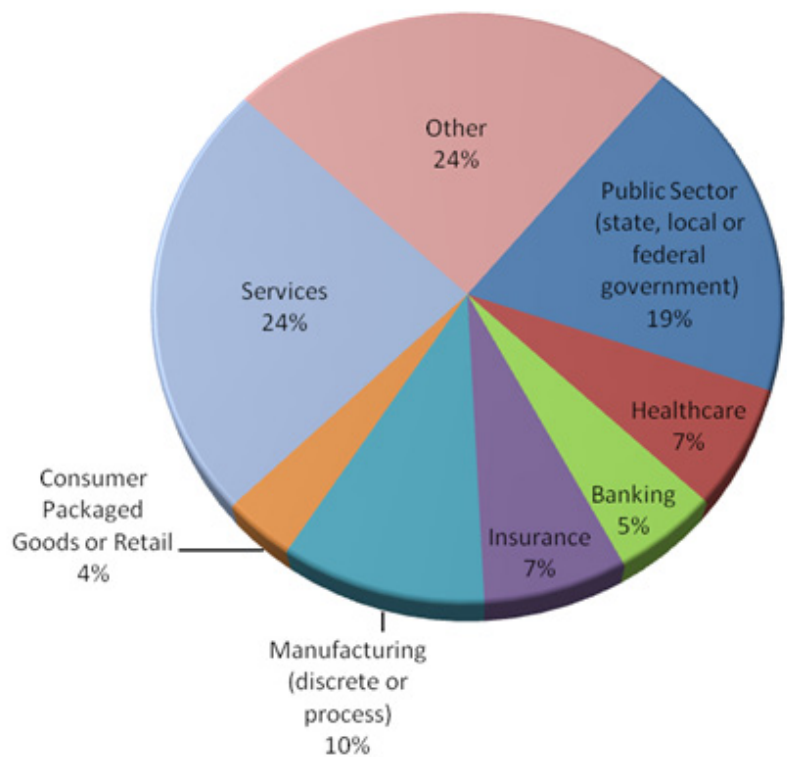


Figure 12

What industry best represents your organization?

### SURVEY METHODOLOGY

The survey was taken by 886 individuals through August 2010 using a web-based tool. The survey was promoted on EndUserSharePoint.com in August 2010 and additional invitations to take the survey were sent via email to individuals across a sampling of companies to understand how widespread the adoption of SharePoint was in the market. Of those people using SharePoint, the survey then looked at how they are using their SharePoint investment within the organization, its support of

business processes and what challenges they are experiencing – with the intention of offering readers of this survey a view into the use and maturity of SharePoint deployments among their peers. Graphs and statistics used throughout this report exclude Global 360 and its partners, including Microsoft and other Business Process Management vendors.

### **ABOUT THE RESEARCH**

Feel free to use this research in presentations, publications, and online with the attribution “Source: Global 360, Inc. 2010, [www.global360.com](http://www.global360.com)” or when tweeting using hash tag “#SharePointSurvey”.

Rather than re-distribute this report to your colleagues and others interested in SharePoint, please direct them to find the survey on our site at: <http://global360.com/resource-center/library>.

### **ABOUT GLOBAL 360**

Global 360 helps organizations to better manage processes today and make improvements for tomorrow. Our process and document management solutions improve business performance by maximizing the productivity of all participants in a process. Building on our strength in financial services, government, insurance, manufacturing, telecommunication and the retail sector, Global 360 has helped more than 2,000 customers in 70 countries reduce paper, automate processes, and empower individuals to truly change how work gets done.

Global 360, Inc. is headquartered in Texas with operations in North America, Europe, Asia Pacific, and South Africa. For more information about Global 360's process and document management solutions, please call 1-214-520-1660 or visit the company web site at [www.global360.com](http://www.global360.com)

### **RELATED RESEARCH**

Global 360, Inc. offers other SharePoint related research and thought leadership documents for your review. Access the documents any time at the links below:

- » [SharePoint as a Strategic Weapon](#)
- » [SharePoint as the Cornerstone of Your Enterprise Process Platform](#)

- » SharePoint: The Central Place to Do Business
- » The Forrester Wave™: Human-Centric BPM for Microsoft Platforms

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