Document Collaboration

Survey Results

Litéra Corp. 2013

CONTENTS

Executive Summary

In late 2012, Litéra® Corp. conducted a survey on document collaboration and topics related to professional productivity. A total of 90 professionals completed the survey. The 10-question, web-based survey was distributed to knowledge workers across multiple industries, including legal, professional services, pharmaceuticals and life sciences, financial services, and others.

Notable Findings from the Survey

- Document production is a fundamental and routine element of the professional workday: 42% of business professionals create, edit, review or approve more than 10 documents per week

- 46% of those polled work with three or more people on a typical document, and nearly 30% of those professionals collaborate with six or more people on a document.

- 40% of business professionals need to collaborate on documents with people outside of their organization.

- Sending documents as attachments via email and using a document management system are the most frequently used methods for document sharing.

- There is a broad range of business processes where collaboration plays a key role: The types of documents that those polled work with most are technical documentation, manuals, policies and procedures, proposals and contracts,

- The two most important outcomes when collaborating on a document are the quality of content and the overall formatting and appearance of the document.

This report looks at the survey results in greater detail, focusing mainly on the professional collaboration practices using Microsoft® Word.

The Components of Document Collaboration and Production

42% of business professionals create, edit, review or approve more than 10 documents per week.

Which Microsoft Office applications do you use?

All survey respondents but one use Microsoft Word for document creation. Other Microsoft Office productivity applications most commonly used by respondents include Excel® and PowerPoint® (93% and 84%, respectively).

When asked how many documents they create, edit, review or approve in a typical workweek, 79% of respondents said they produce at least four, with a total of 42% working on more than 10 documents each week.
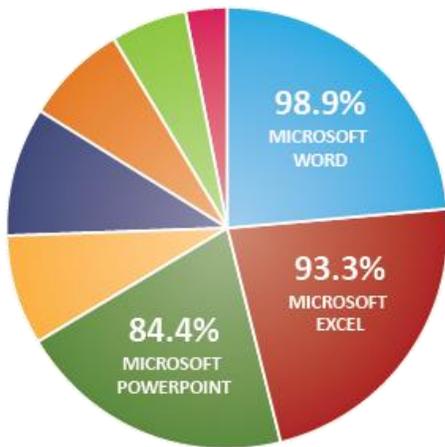
None of the survey respondents indicated they use an application other than Microsoft Word for document production; similarly, all of those polled said they work on at least one document per week.

When collaborating on a document, 91% of knowledge workers interact with others in its production, the survey found. The high degree of reliance upon co-workers to produce a document stems from the need to ensure the completed document is as high-quality as possible, the survey also revealed.

When it comes to internal versus external collaborators, the survey shows that 40% of business professionals collaborate on documents with people outside of their organization, underscoring the need for a secure and streamlined method of document collaboration.
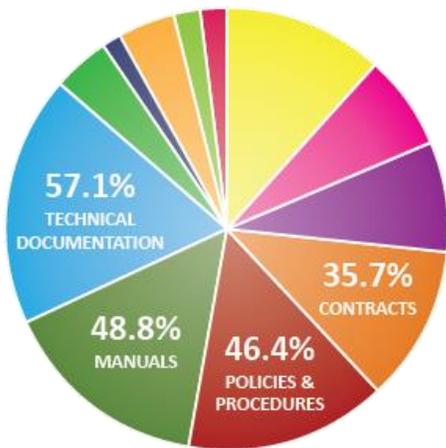
98.9% MICROSOFT WORD

93.3% MICROSOFT EXCEL

84.4% MICROSOFT POWERPOINT

Types of Documents Most Collaborated On

This survey found that a broad range of documents are collaborated on within the enterprise, indicating that a similarly broad range of professionals need to collaborate on those documents since a variety of business processes are impacted.

The types of documents that those polled collaborate on most frequently are:

- technical documentation (57%)

- manuals (49%)

Generally, what type of documents do you work on with others most?

- policies and procedures (46%)

- proposals (37%)

- contracts (36%)

- service agreements (25%)

- statements of work (23%)

- marketing collateral (13%)

- business plans (13%)

Survey respondents also indicated that a host of legal documents are the product of collaboration, including letters, pleadings and others.

Based on the overall list, high-value internal and external processes are dependent upon effective document collaboration.

Methods of Document Collaboration

By a large margin, the primary methods of collaborating on documents are by emailing an attachment to collaborators and using a document management system. In fact, 91% of respondents said they use email as their main or frequently used method of document collaboration.

The survey found that fileshares are also employed, to a much lesser extent, by 29% of respondents.

Extranets, workflow tools and cloud-based services are used very infrequently. Specifically, these methods of document collaboration are rarely or never used by 69% of respondents.

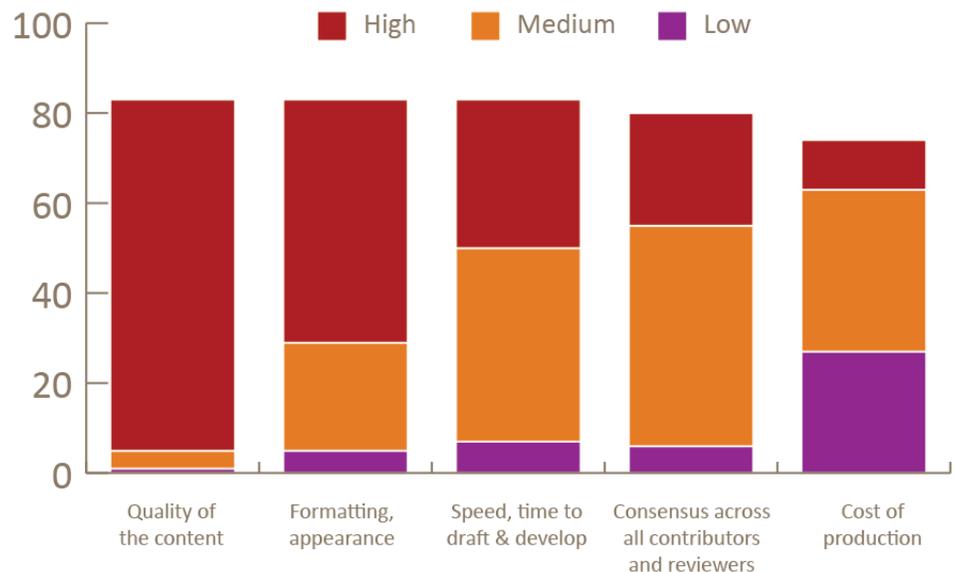## Reasons for Document Collaboration

Nearly 90% of those polled said that quality of content ranks highest in importance. One respondent indicated that document comprehensiveness is also very important, which may be considered a function of overall quality.

Next in terms of what's most important are document formatting and appearance, according to 60% of respondents.

Speed, or the time it takes to draft and complete a document, is considered to be of high importance by 37% of those surveyed.

Consensus across all contributors and reviewers, and cost of production ranked high in importance by just 28% and 12% of knowledge workers polled, respectively.

Please rank the order of importance for you when working with other people on a typical document.

"Word Track Changes causes lots of problems for us."

Current Document Collaboration Technology Leaves Professionals Wanting

The survey asked knowledge workers what document collaboration functionality they would most like to use in their role or their company. The top five types of functionality most desired by knowledge workers are:

1. Access from mobile devices (59%)
2. Ability to work with a single instance of a document and avoid creating multiple versions of a document (58%)
3. Preventing reviewer overwriting and editing conflicts (53%)
4. Having a full audit trail of all reviewer activities (53%)
5. Ability for document owner to review all suggested changes simultaneously (52%)

These preferences were complemented by a range of additional requests, including online editing using Microsoft Office grade tools (48%), the ability to work offline (48%), real time collaboration for unlimited internal and external users (46%), integration with other enterprise applications such as document management systems (45%), allowing document owner to assign deadlines and see status (41%), and professional-grade security for access, sharing and auditing (39%).

Conclusion

Document collaboration among knowledge workers across a range of industries is a fundamental component of multiple high-value business processes. The need for professionals to collaborate with others outside of their organizations while streamlining the review and approval process is seen as a highly desirable capability in terms of document production. While email and document management systems are heavily relied upon for document sharing today, a more elegant solution is needed to eliminate time-consuming and error-producing issues, such as version proliferation, reviewer overwriting and conflicts, and not having a full audit train of all reviewer activities.

About Litéra

Litéra enhances professional productivity and risk reduction through a comprehensive suite of document creation, collaboration, comparison, control, and cleaning solutions. Litéra's patented applications eliminate the need for tedious, manual reviews and give true Content Confidence® across complex documents, spreadsheets, presentations, and PDFs.

Litéra IDS® allows unlimited users to share input across firewalls on a single live document, and all changes and reviewer activities are retained. Litéra IDS provides team members with true simultaneous document collaboration, each with the ability to send to another user for additional input. This builds an unlimited collaboration tree and enables the author to get input from all the best minds in an organization.

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