

Osterman Research SURVEY REPORT

Survey Report by Osterman Research
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Filling the Gaps in Office 365

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Overview

The title of this white paper notwithstanding, Osterman Research wants to make it clear at the outset that we believe Microsoft Office 365 to be a robust and capable platform, one that will serve most organizations well. If your organization is using Office 365, we recommend you continue to do so. If you're not using it, we recommend you consider it. Microsoft offers a large, varied and growing number of features and functions in Office 365, and at a wide range of price points that will satisfy a number of different markets.

That said, decision makers evaluating the efficacy of Office 365 to meet their business requirements must be aware of its shortcomings in the areas of data protection, archiving, security, encryption, authentication and eDiscovery (among others) covering workloads like Exchange Online, SharePoint Online, OneDrive for Business, Skype for Business, and Azure Active Directory. An awareness of these shortcomings enables decision makers to plan for the mitigations required to assure the proper business performance of Office 365.

ABOUT THIS WHITE PAPER

This survey report presents the results of a primary market research survey conducted with members of the Osterman Research survey panel and others during October 2017. The survey was conducted with 140 members of the panel, located primarily in North America.

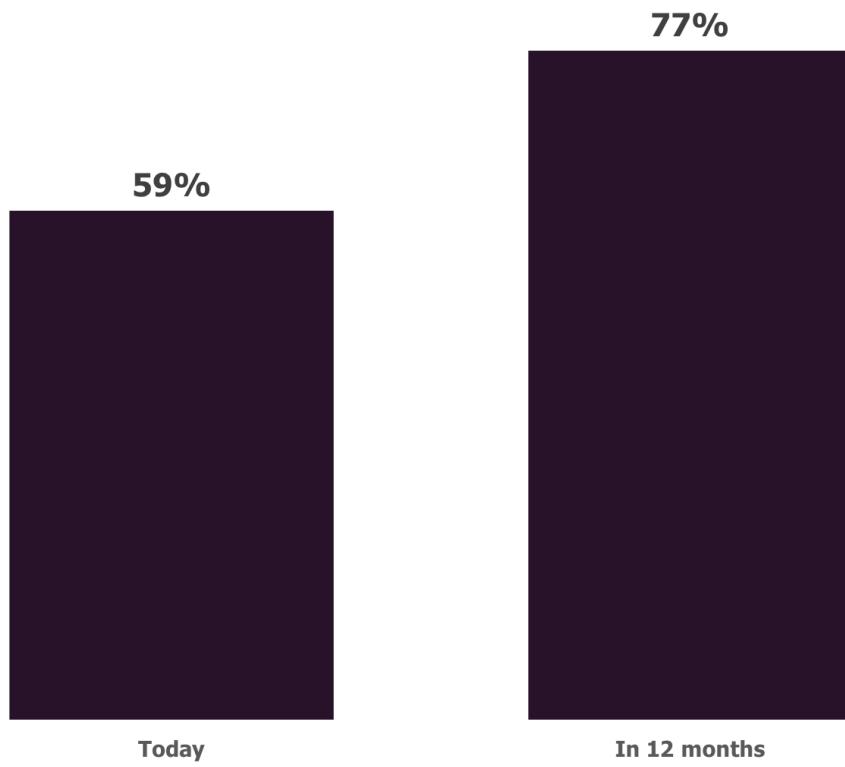
Here are the key details of the survey:

- Mean number of employees at the organizations surveyed: 17,952 (median was 1,800).
- Mean number of email users at the organizations surveyed: 14,918 (median was 1,700).

Survey Findings

Figure 1

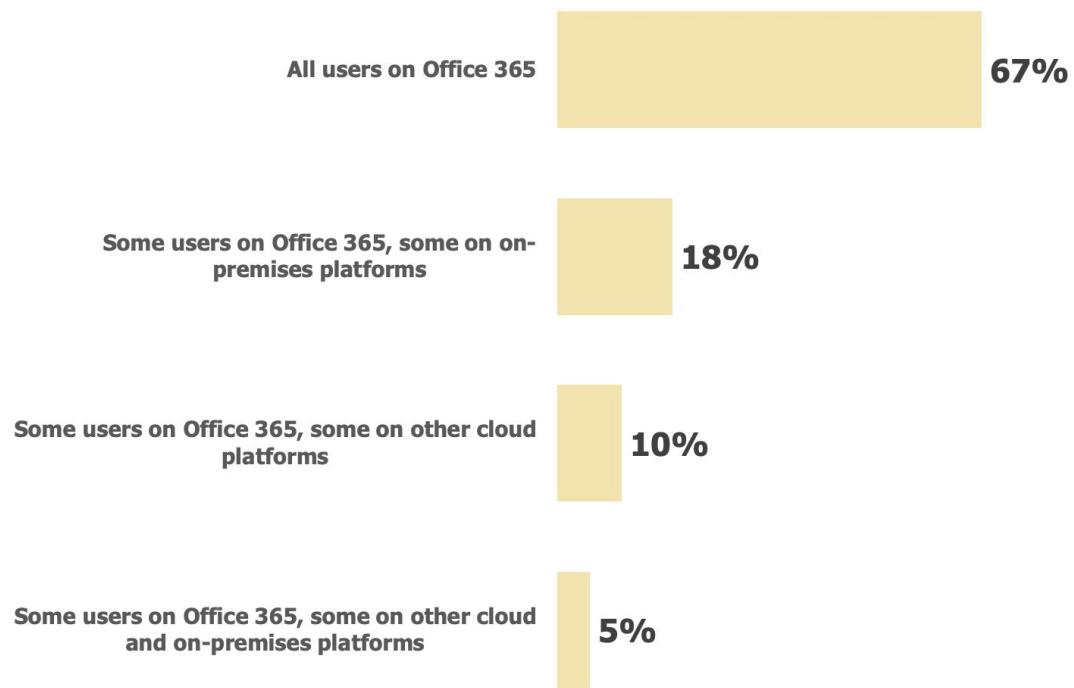
"What percentage of your users have been migrated to Office 365 so far, and what will this percentage be in 12 months?"



Source: Osterman Research, Inc.

Figure 2

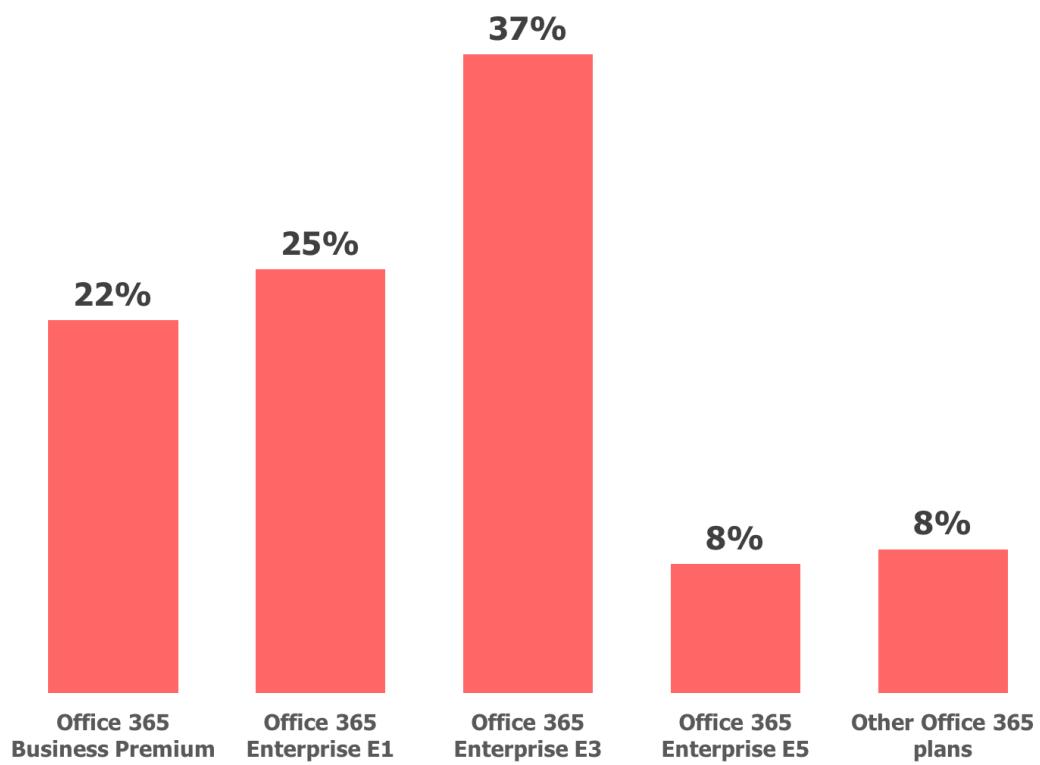
"Which of the following best describes your ultimate Office 365 deployment once it is completed?"



Source: Osterman Research, Inc.

Figure 3

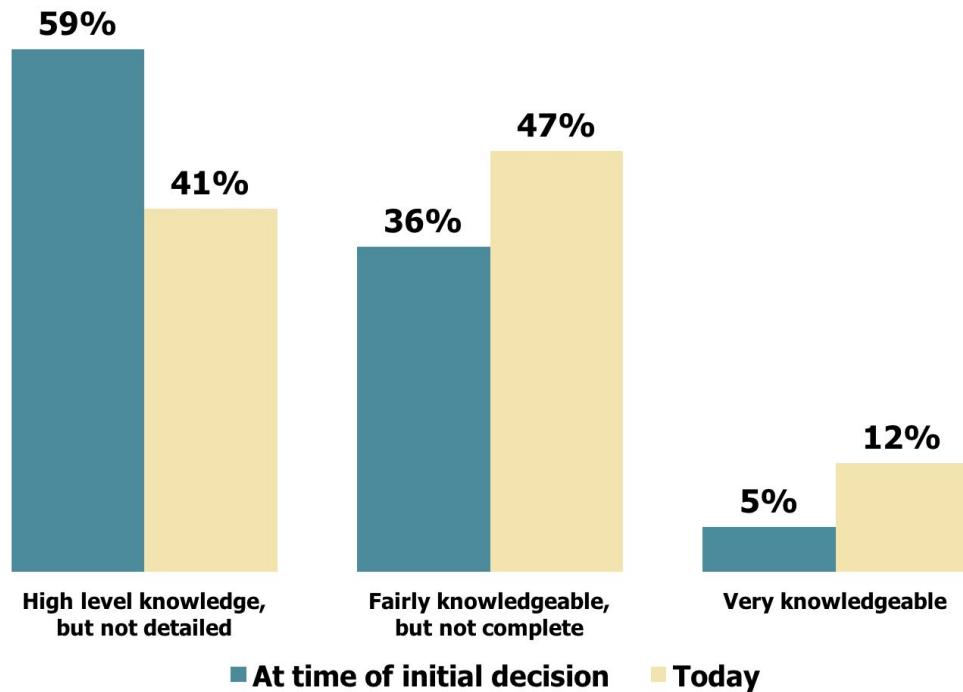
"What percentage of your Office 365 users are on each of the following plans?"



Source: Osterman Research, Inc.

Figure 4

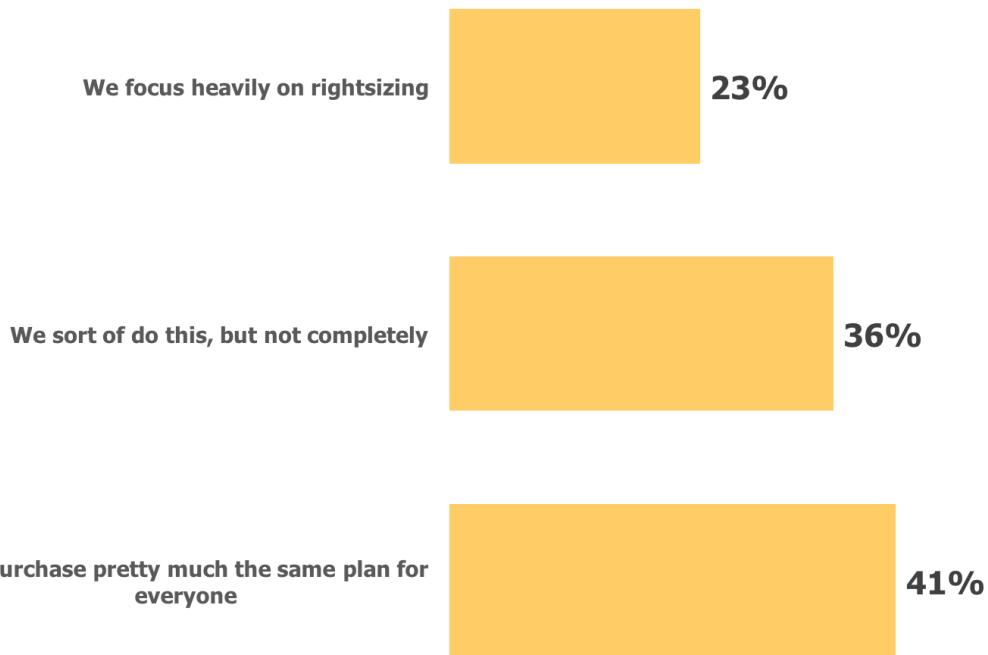
"Think about the decision makers in your organization who made the decision to implement Office 365 in your organization. Which of the following best characterizes their knowledge of Office 365's capabilities TODAY? How would you have answered this question when the decision to implement Office 365 was made initially?"



Source: Osterman Research, Inc.

Figure 5

“To what extent is your organization “rightsizing” Office 365 – i.e., purchasing plans for specific users or groups that meet their unique requirements?”



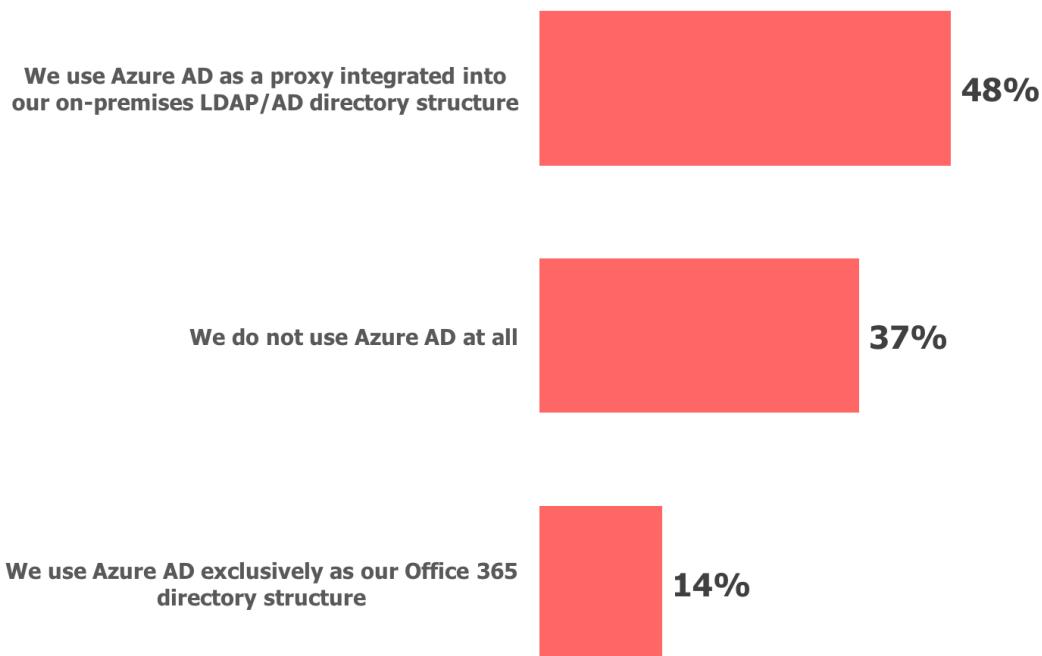
Source: Osterman Research, Inc.

Figure 6

"If your organization is rightsizing Office 365, which of the following groups is/was involved in the process to do so?"



Source: Osterman Research, Inc.

Figure 7**"Which of the following best describes your organization's use of Azure AD to manage user groups?"***Source: Osterman Research, Inc.***Figure 8****"On a scale of 1 to 7, how important are each of the following to IT decision makers in your organization, regardless of the platform, where 1 is 'not important at all' and 7 is 'extremely important'?"**

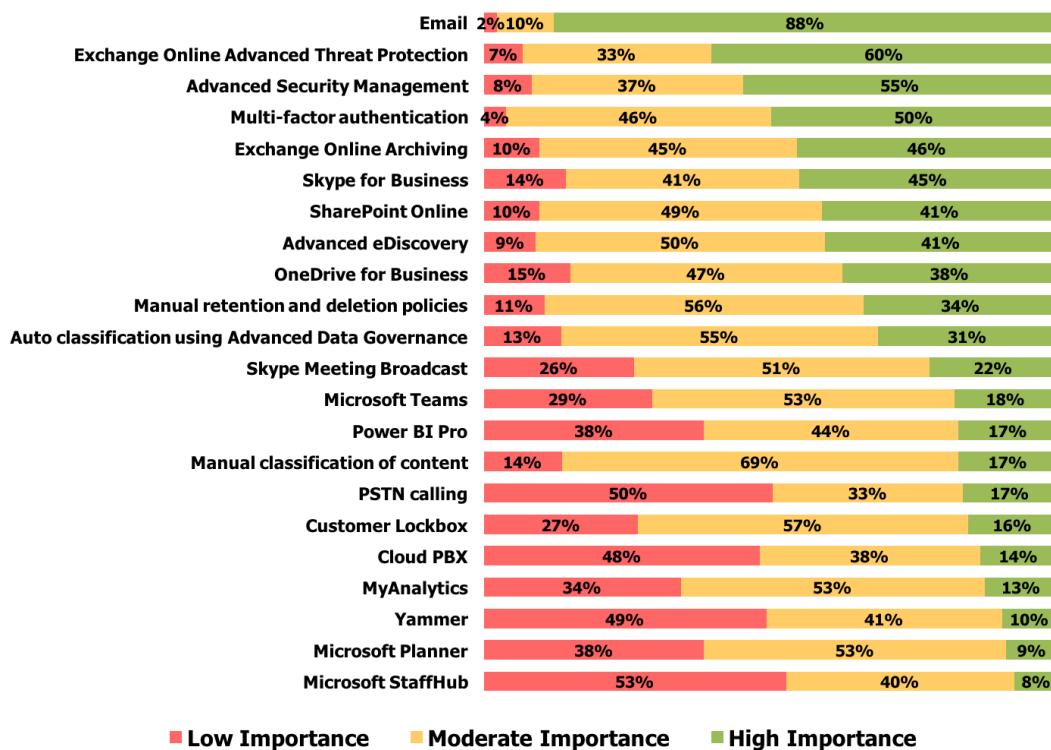
Percentage responding "important" or "extremely important"

Issue	%
Rapid email delivery that is as close to real time as possible	61%
The ability to search content	59%
The ability to archive email	55%
Enabling desktop-to-desktop encryption	39%
Highly granular policy management	38%
The ability to automatically redact sensitive information sent in email or attachments	38%
The ability to archive content types other than email	34%
Giving users the ability to manage encrypted messages that they send (create expiration time, recall sent messages, etc.)	33%
Having archived content stored separately from the email infrastructure	27%
The ability to remove hidden information in attachments, such as document properties or version information	27%

Source: Osterman Research, Inc.

Figure 9

"On a scale of 1 to 7, how important are each of the following capabilities that are included in Office 365 to IT decision makers in your organization, where 1 is "not important at all" and 7 is 'extremely important'?"



Source: Osterman Research, Inc.

Figure 10

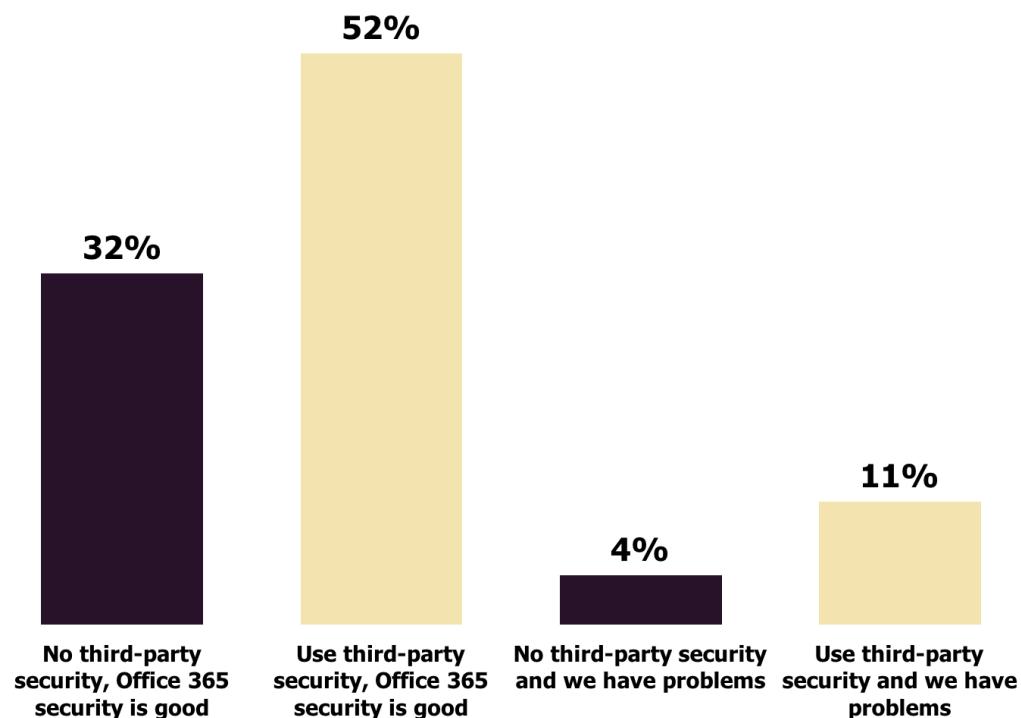
"On a scale of 1 to 7, how important are each of the following archiving capabilities to IT decision makers in your organization, where 1 is 'not important at all' and 7 is 'extremely important'?"

Capability	%
The ability to place content on legal hold in Office 365	65%
The ability to perform eDiscovery in Office 365	60%
The ability to archive email from Office 365	58%
The ability to supervise data in Office 365	38%
Maintaining chain-of-custody for archived data	37%
The ability to archive SharePoint content	35%
The ability to archive content in OneDrive for Business	33%
The ability to provide a preview of attachments during a review of archived data without the need to open the attachments themselves	33%
The ability to ensure the immutability of archived data	30%
Indexing of all file types used by your organization in an archiving system	27%
The ability to archive Skype for Business content	25%
The ability to archive content from other non-Microsoft platforms	17%
The ability to archive Microsoft Teams content	15%
The ability to archive content from Slack	11%
The ability to archive Yammer content	8%

Source: Osterman Research, Inc.

Figure 11

"Which of the following best describes your current threat exposure for Office 365?"



Source: Osterman Research, Inc.

Figure 12

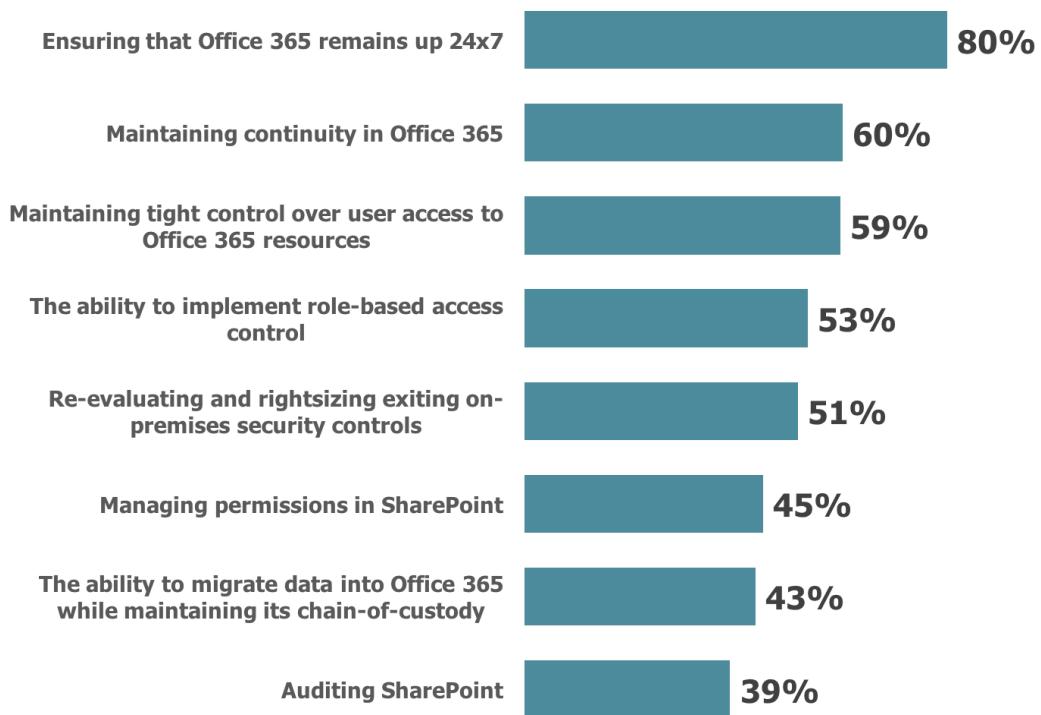
"On a scale of 1 to 7, how important are each of the following security capabilities to IT decision makers in your organization, where 1 is 'not important at all' and 7 is 'extremely important'?"

Capability	%
The ability to block ransomware attacks	89%
The ability to detect and block all known threats	86%
The ability to block spearphishing attacks	86%
The ability to detect and block email fraud and email spoofing	85%
The ability to block advanced threats	84%
The ability to block zero-day threats	79%
The ability to remove active content and other components in an email that might be malicious	76%
The ability to block malicious files on OneDrive and SharePoint	68%
The ability to block internal email threats	67%
The ability to plug in third party anti-malware, anti-spam and other security capabilities to Office 365	65%
The ability to offer multi-factor authentication to manage user access	64%
The ability to centrally manage policies across all communication channels, both within Office 365 and on other platforms	61%
Support for an outbound email quarantine	61%
Integration points into our security ecosystem (such as web, network access enforcement points)	61%
The ability to leverage a third-party two-factor authentication or multi-factor authentication solution	58%
Maintaining right control over third-party app access to Office 365 resources	57%
The ability to protect the personal email of employees, as well as enterprise email	50%

Source: Osterman Research, Inc.

Figure 13

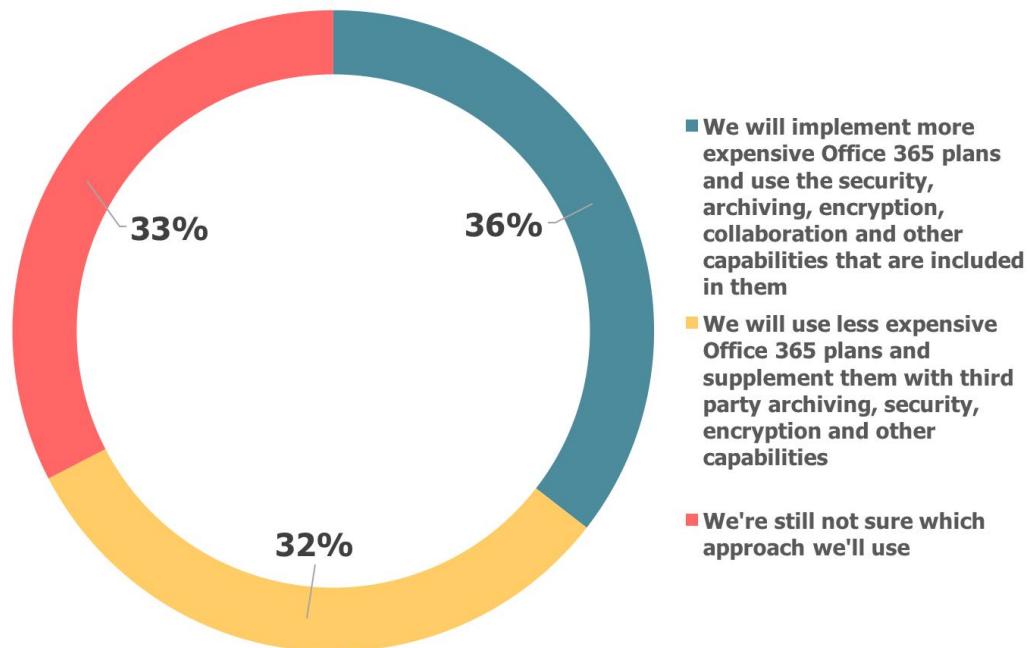
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Figure 14

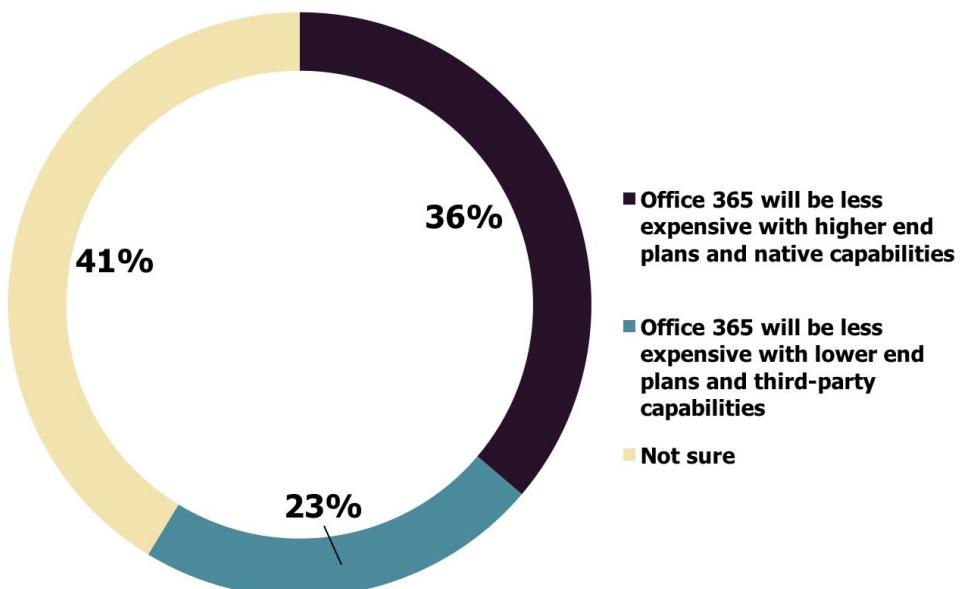
“Generally, which of the following best describes your organization’s current philosophy with regard to Office 365?”



Source: Osterman Research, Inc.

Figure 15

“Which of the following is closest to your view?”



Source: Osterman Research, Inc.

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