Gartner Peer Insights ‘Lessons Learned’: Implementing Enterprise Information Archiving Software

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EIA software products, designed to archive user-generated data, are crucial for businesses with continued focus on compliance requirements, retention policies and information storage optimization. I&O leaders can learn from the implementation experience shared by peers on Gartner Peer Insights.

Overview

Gartner Peer Insights is a free peer review and ratings platform designed for enterprise software and services decision makers. Reviews go through a strict validation and moderation process to ensure they are authentic.

We analyzed 246 Peer Insights reviews to identify lessons learned implementing enterprise information archiving (EIA) software. This report focuses on the responses to the questions: “If you could start over, what would your organization do differently?” and “What one piece of advice would you give other prospective customers?” To browse all reviews, see the full list of reviews Enterprise Information Archiving on Peer Insights.

Peer Lessons Learned

This “Peer Lessons Learned” summarizes clients’ firsthand experiences with implementing EIA software. The peer advice results both from successful implementation of projects and learnings based on what went wrong. This peer perspective, along with the individual detailed reviews, is complementary to expert research and provides a holistic view to the implementation process. Reviewers who submitted their lessons learned represent a cross-section of small- to midsize and large organizations. See Figure 1 for demographics details.
Below are some key lessons learned and most cited recommendations by Peer Insights reviewers to help infrastructure and operations (I&O) leaders in the implementation process of their EIA software.

Lesson 1: Analyze Business Needs for an EIA Software; Gain an Understanding of Hidden Costs While Selecting the Vendor

Peer reviewers suggest that business needs of an organization should be analyzed in order to assess the requirement of an EIA software. They suggest that a certain amount of adjustment would be required in processes undertaken by the business including cost analysis, retention policies and so forth. Though EIA software brings an ease in handling archival data, peers highlight the importance of having clear communication and understanding of the costs associated with selecting such a software.

A peer suggests evaluating the organizations’ requirements against the software:

Look at your organization’s data accessibility and retention requirements and assess them with product offerings. This exercise would give your organization an idea of whether the product is fit for use in the company.

— Infrastructure and Operations Professional, Manufacturing Sector
Another peer recommends:

Be very specific with any requirements that may be unique to your company and be very detailed with what you want the system to achieve for you. Once the scope of your individual company requirements is defined, incorporate them in a contract.

— Technical Professional, Finance Sector

On the costs associated with product pricing, a peer says:

We could have negotiated well with pricing of a platform. We want to negotiate more in future while deploying this tool in other departments/regions of our organization.

— Data and Analytics Professional, Finance Sector

Peer recommendations include:

- Review your archiving requirements, and that the policies you intend to implement cover all regulatory and government requirements for archiving your data.

- Negotiate the pricing of the platform to make it more economical.

- Enforce archival data retention within the company while establishing baseline requirements to limit costs and understand liabilities.

- Budget for costs associated with add-on features and additional services. Identify costs that will be borne by the organization in comparison to those that will be covered by the vendor.

Recommended reading:

Critical Capabilities for Enterprise Information Archiving

Lesson 2: Weigh Out All Data Flow Scenarios and Define Retention Policies for Smooth Migration
According to peer members, it is important to run all scenarios to improve the syncing process for easy management and restoration of data. They suggest that having a clear retention policy in place from the beginning ensures seamless migration and maintains clarity in archiving datasets.

A peer suggests:

We would simulate all scenarios of data flow that have to be captured to ensure there is complete compliance and proper risk mitigation and ensure only then the data is archived for future retrieval processes.

— Technical Professional, Manufacturing Sector

A peer reviewer says:

Compel leadership to define data retention policies within the organization. Such a policy should be enforced at inception and not after. There should be a focus on syncing to ensure a smooth migration and reduce risk of losing data.

— Technical Professional, Healthcare Sector

Peer recommendations include:

- Draft retention rules of data archival before starting the process of data archiving. Moreover, ensure that sensitive data, like files and emails, is handled appropriately in line with the processes of the organization.

- Ensure that the process is structured in a way that new and additional data can be accommodated in the future.

- Run a test by ingesting a sample of legacy data ahead of time to gain experience of how the product works from an end-user perspective. Gain a better understanding of how legacy data is handled.

Recommended reading:

Magic Quadrant for Enterprise Information Archiving

Lesson 3: Design an Appropriate Training Program for End Users
Peer members urge organizations to focus on providing training to all users through online and in-house models. They suggest that a proper training module can help with the implementation and ensure faster utilization of the tool.

A peer recommends:

We would have provided more end-user training on the product for our administrators and help desk staff. There were a lot of follow-up questions from these areas that were not covered in the online training. If we could do it differently, we would have developed our own in-house training curriculum.

— Application Professional, Government or Public Sector

Another peer suggests:

Get better insight on archival settings, and get employees trained on the toolsets to ensure proper and efficient utilization of the storage solution. Effective training also ensures a smoother transition while integrating the tool.

— Infrastructure and Operations Professional, Service Sector

Another peer highlights the need for internal training for data retention:

The creation of data retention policies requires a good amount of expertise. Prospective users should think about having good initial training for the users to avoid issues while storing or retrieving the data.

— Data and Analytics Professional, Service Sector

Peer recommendations include:
Lesson 4: Build an Implementation Plan Prioritizing Internal Policies and Working With Experts

Peer reviewers urge I&O leaders to create a plan for implementing the solution in their organization, keeping best practices in mind and working with experts for an effective implementation process. They recommend one-time implementation and rethinking the number of policies.

Describing an effective implementation strategy, a peer reviewer says:

To have a good implementation, directly interact with the platform’s professional services if possible, or through a reliable and experienced channel/partner. Once it is carefully implemented, take care of it on a daily basis. Watch the console constantly and fix all the alerts/warnings it presents you. Have an active support contract and don’t hesitate to raise tickets with your support every time you don’t feel comfortable with some configuration or warning.

— Infrastructure and Operations Professional, Energy and Utility Sector

Another peer reviewer adds:

We would recommend purchasing and setting up everything at the implementation stage. When implementing, it is best to follow best practices and follow the advice of the implementation engineer. Do not try to figure it out without consulting them.

— Analyst, Retail Sector
Peer recommendations include:

- Execute a one-time setup at the implementation stage, where possible, instead of adding services at a later stage. If possible, implement cloud solutions directly.
- Modify access to users based on your organization's need to share data. Appoint a dedicated team to provide support services.
- Account for time to implement all deliverables, including time for migration from a preexisting tool.
- Track the number of policies that should be implemented. Endeavor to simplify your policies and keep the number of administrators to a minimum.

Methodology

Of the Peer Insights survey data considered for this market, only those responses meeting the following criteria were included in this synthesis:

- Reviews less than 12 months old.
- Responses that pertain to the project experience and are not tied to the capabilities of a vendor.
- Reviews were clustered into the top-four most-referenced categories (lessons learned) and then listed in order of relevant phases in the project life cycle.

The results of this synthesis are representative of the respondent base and not necessarily the market as a whole.

“The data used in this report is drawn from reviews on Peer Insights, a crowdsourced enterprise review platform that relies on dynamic data. Key to maintaining the integrity of the site is our ongoing moderation and validation of those reviews. Reviews are examined before publishing to the site and periodically, post-publishing. Due to the dynamic nature of the data, the external Peer Insights site will always have the most updated view of the data in this report.”

Document Revision History

Gartner Peer Insights 'Lessons Learned': Implementing Enterprise Information Archiving Software - 19 March 2020

Recommended by the Author

Magic Quadrant for Enterprise Information Archiving
Critical Capabilities for Enterprise Information Archiving
Gartner Peer Insights 'Voice of the Customer': Enterprise Information Archiving