

5 MYTHS THAT STALL STRATEGIC CONVERSIONS

See past the myths, convert to the right platform and let data-driven opportunities emerge



Hyland®

ORGANIZATIONS ARE PERFORMING LARGE-SCALE DATA MIGRATIONS AT AN INCREASING RATE

Migration efforts are not only required as your data-driven technology and systems age, they're often a strategic component in keeping pace with today's digital marketplace. This includes:

- Replacing first generation data repositories and enterprise content management (ECM) systems with those that have better security, extensibility and integration capabilities.
- Consolidating siloed repositories that inhibit strategic data-sharing, automation and instant access to information from anywhere, anytime.
- Sunsetting legacy systems that have considerable maintenance costs but no longer meet performance requirements or deliver required return on investment.

LEARN HOW TO SEE PAST COMMON MYTHS, AND LET DATA-DRIVEN OPPORTUNITIES EMERGE

Conversion projects from legacy content management repositories to a modern platform can be daunting to business unit and project owners — and may not be a priority for executives currently — but the risk of doing nothing can't be underestimated.

Read on to learn about the five most common myths impeding data-driven transformation. You'll see simple strategies for how to leverage content and data conversion methodologies, and discover resources that ensure successful conversion projects.

Position your people to use organizational data to provide the best customer experiences, and enable your business to seize opportunities as they emerge in today's data-driven world.

CLICK TO FIND OUT MORE



Myth 1



Myth 2



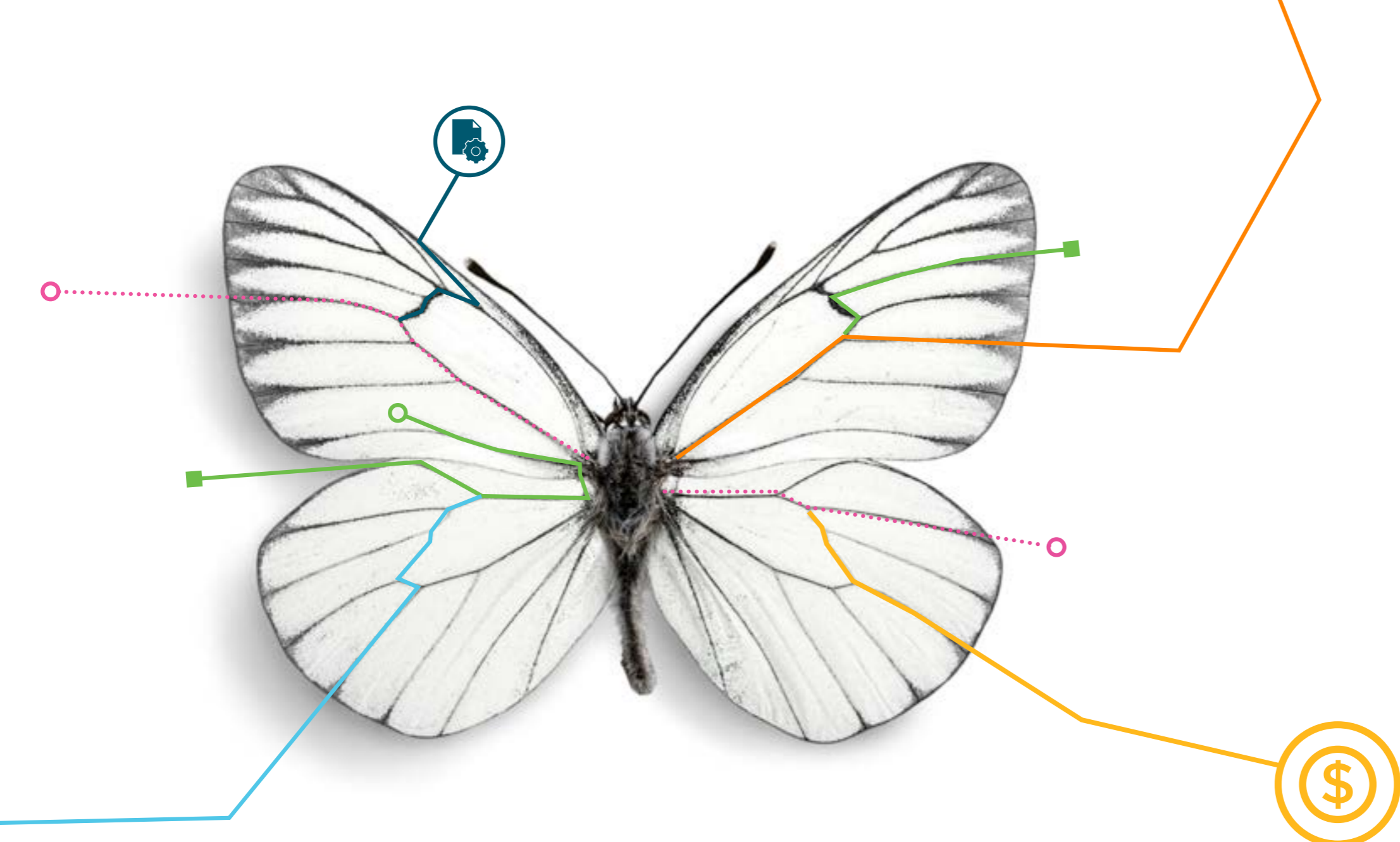
Myth 3



Myth 4



Myth 5



MYTH 1

It's going to cost too much to convert data from the old system to the new



MYTH 1

IT'S GOING TO COST TOO MUCH TO CONVERT DOCUMENTS AND DATA FROM THE OLD SYSTEM TO THE NEW

Don't let cost be the prohibitive factor preventing your conversion project from getting off the ground. Costs can be easily minimized by approaching the migration effort with the right project methodology.

When researching top content services vendors, look for one that offers flexibility in conversion efforts. With standards and technology evolving rapidly in today's digital world, vendors should be equipped to meet you where you are in terms of resources and budget.

It is worth your time to talk to an experienced conversions expert who can assess what you want to accomplish and advise you on the best method to approach your conversion effort. This exploratory conversation should be free of cost.

COMMON OPTIONS FOR CONVERSION TO CONTENT SERVICES PLATFORMS INCLUDE:

Comprehensive offering

The vendor takes complete ownership of every aspect of the project. This minimizes the need for additional resources on your end, ensures an expedited experience and reduces risk.

Data mapping and import

This type of service offers a comprehensive conversion after your resources perform the extraction from the legacy system (with specifications defined by the vendor).

Export

This level provides the ability for you to own the task of importing legacy content into your new content services platform at your own pace.

By following proven methodologies for converting content and data to a modern content services platform, you can also avoid the risk and cost of project completion delays or downtime — including disruption to business processes and risk to service level agreements (SLAs).



We created efficiencies, increased accuracy and lowered costs through structured processing. This allows us to continue to move quickly to provide great service to our members.”

Heather Lally

Vice President of Operations, Alliant Credit Union



MYTH 1

WHERE IS THE COST MORE SIGNIFICANT TO YOUR ORGANIZATION?

Consolidating data from multiple, disparate repositories and migrating to a modern platform enables much more efficient use of organizational data. Including eased integration capabilities, workflow automation, security and scalability.

There is no denying that today's users require instant access to information at any time, from wherever in the world they are. This capability is well within reach for any organization when leveraging modern information management or content services platforms.

Consider these questions when weighing project costs for consolidating and migrating valuable data to a modern platform versus the true cost of maintaining legacy systems.



Do solutions integrate with existing line-of-business systems, enabling interoperability?



Are documents and data instantly available whenever and from wherever users need them?



How much custom coding is required to modify workflows as needed?



Are any of your legacy systems on older versions no longer supported by tech support? What is the risk in this?



Can solutions scale to accommodate multiple processes across regional offices and locations?



Is return on investment (ROI) from legacy systems worth the yearly maintenance fees required to keep them updated and secure?



MYTH 1

TODAY'S SIMPLE REALITY

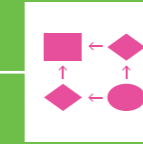
Today's organizations in every industry face a common reality: multiple, siloed and aging content repositories — leading to duplication of efforts and inefficiency in user business processes across the enterprise.

This requires IT and leadership to manage security, retention, user enhancement requests, vendor management and perpetual licensing fees for multiple systems. It also creates considerable risk when faced with aging systems that no longer are supported by tech support.

According to AIIM, more than half of respondents to the Embracing Content Services Report have at least two, and up to 10, content management systems to support, and:

- Find content silos a significant business challenge.
- Are doing something about it by migrating existing systems to a modern platform. It's a simple solution to a complex problem.

Is your data strategy part of the solution or stalled in the problem?



66%

Of respondents have multiple content management systems that manage electronic documents and data

- **21%** Have more than 10 ECM or content management systems
- **45%** Have two to five ECM systems



66%

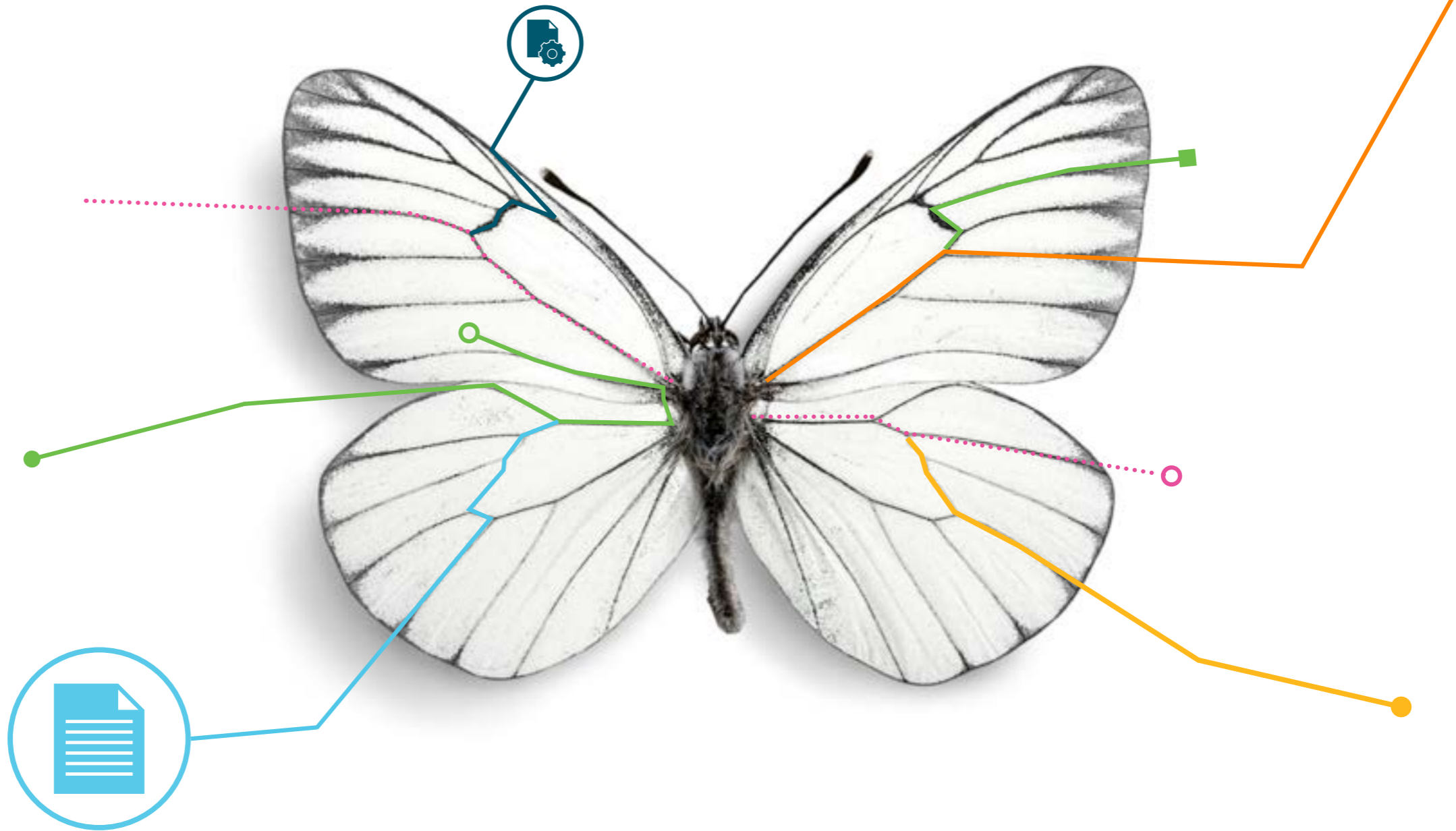
Say content silos across repositories are the largest content-related business challenge



54%

Of respondents plan to update, replace or migrate an existing system

- **24%** Plan to migrate their existing systems to a modern platform
- **30%** Plan is to selectively update, replace or migrate existing systems as needed¹



MYTH 2

We'll have to migrate our entire library of documents, data and content all at once

MYTH 2

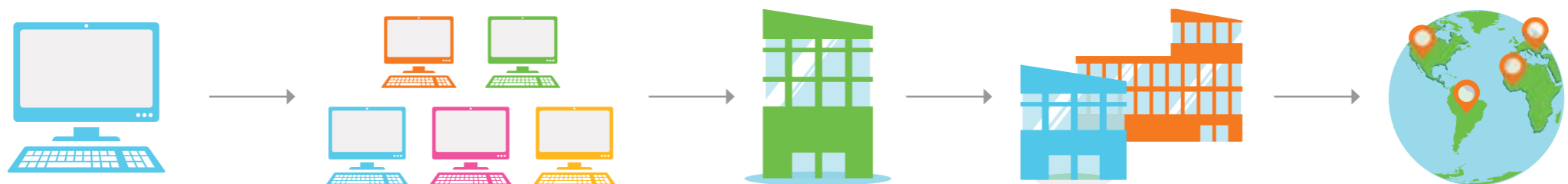
WE'LL HAVE TO MIGRATE OUR ENTIRE LIBRARY OF DOCUMENTS, DATA AND CONTENT ALL AT ONCE

Your data migration doesn't have to take place all at once.

1. Consider the business areas where migrating to a modern platform will deliver the biggest positive impact.
2. Prioritize business areas according to those that will enhance security, user experience, compliance and return on investment.

Additionally, modern content services platforms that contain features including federated enterprise search, industry-specific and key business area case management solutions and low-code integration capabilities provide your users nimble accessibility to repositories not yet scheduled for conversion.

This way you can begin the strategic migration with as little as one department or process and expand across the enterprise as time, budget and priorities permit.





Accessing key pieces of information quickly and accurately across millions of documents, multiple systems and formats is an absolute requirement. Enterprise Search has given us a single point of access for accurate and rapid investigative research across structured and unstructured data.”

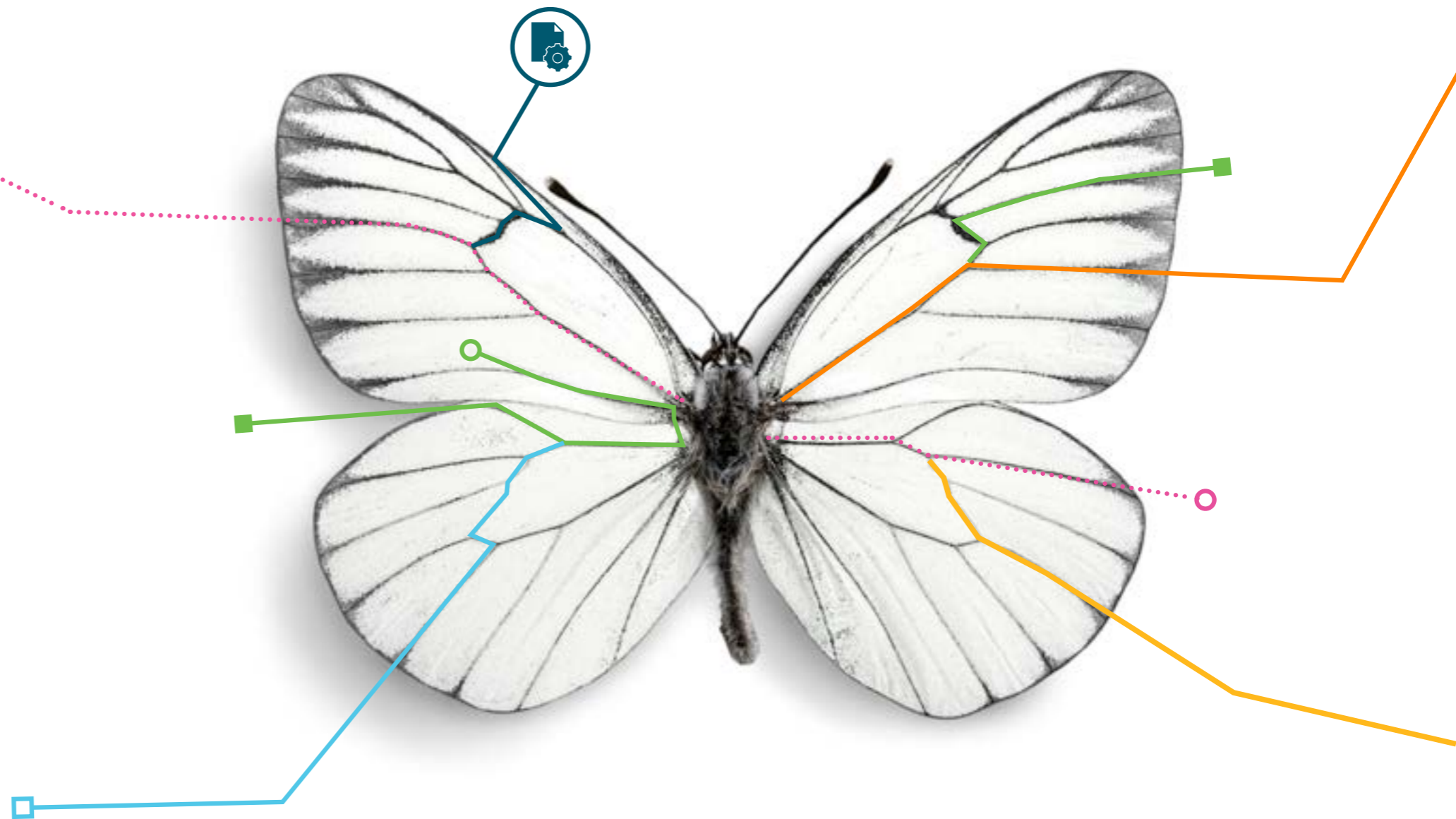
Bob Johnston

Deputy Chief Inspector, Bedfordshire Police



MYTH 3

Replacing our outdated or unsupported legacy system is not an executive priority





MYTH 3

REPLACING OUR OUTDATED OR UNSUPPORTED LEGACY SYSTEM IS NOT AN EXECUTIVE PRIORITY

We all know that in order for any project to be successful, you need the support of executives and upper management.

What many decision-makers may not have on their radar **is the potential ROI** that begins with a strategic data management strategy.

- A unified data strategy supports integrations between your content platform and line-of-business systems, securely connecting organizational data and documents to users who require them.
- Leveraging documents and data with the right content platform can also be a gateway to optimizing business processes with very few IT resources.
- A strategic data strategy securely supports, automates and optimizes processes in areas from finance to HR and enables visibility into potential areas of risk.
- Reducing database and document and data repository sprawl frees up both the time to securely maintain them, and ongoing maintenance costs.

ACCORDING TO FORRESTER'S CONTENT AT YOUR SERVICE STUDY, CONTENT SERVICES LEADERS ARE MUCH MORE LIKELY THAN BOTH FOLLOWERS AND LAGGARDS TO:

1

Describe their digital transformation efforts as successful,

2

Report higher revenue gains, and

3

Say the experiences they offer both their customers and employees consistently exceed expectations?



According to Forrester's Content At Your Service study: "While ECM decision makers understand their content is an important avenue through which to improve customer experience, **73 percent say that content is an undervalued source of data for customer insights at their organizations.**"

Respondents point to many culprits for these failures. Topping their list are high costs and a lack of budget to cover them; difficulty migrating content from older systems; lack of available expertise and executive support; and managing too many technologies and partners.

Managing all these overlapping systems is inefficient; it also negatively affects the experience of employees — and, in turn, of customers — by making it more difficult and time-consuming to make meaningful connections between content assets."³



MYTH 3

10 LEADING ADVANTAGES OF MODERN CONTENT SERVICES PLATFORMS

- 1 CAPTURE — IMMEDIATELY GAIN CONTROL OVER INCOMING INFORMATION**
Capture and organize into a single platform documents and data from any location, in any format, with minimal human interaction.
- 2 CLOUD OR ON PREMISE CONTENT MANAGEMENT — PROVIDE CONSISTENT ACCESS TO INFORMATION**
Simplify how your users interact with the information they need — keep it organized, secure and accessible.
- 3 CUSTOMER COMMUNICATIONS MANAGEMENT — IMPROVE RELATIONSHIPS**
Optimize customer communication and improve business processes and customer experiences.
- 4 COLLABORATION — ENABLE SIMPLE, SECURE SHARING AND COLLABORATION**
Ease collaboration with remote co-workers, patients or customers in any industry.
- 5 REPORTING AND ANALYTICS — GAIN VISIBILITY AND INSIGHT INTO CONTENT AND PROCESSES**
Monitor, report on and optimize your key processes and work streams, enabling continuous improvement.
- 6 LOW-CODE PLATFORM — ELIMINATE COSTLY CODE**
A rapid application configuration platform minimizes the need for custom coding for the exact solution you need.
- 7 CASE MANAGEMENT — STRATEGICALLY MANAGE CASE DATA, TASKS AND ACTIVITIES**
Optimize capabilities to manage data relationships, documents and processes, and empower staff to effectively manage cases and make better decisions.
- 8 FEDERATED SEARCH — INTELLIGENTLY FIND NEEDED INFORMATION ACROSS YOUR ORGANIZATION**
Ease the challenge of securely finding exactly what you need, when you need it, in the massive volume of content within your organization.
- 9 RETENTION AND RECORDS MANAGEMENT — AUTOMATE SECURE RETENTION AND DESTRUCTION OF RECORDS**
Securely, automatically manage your content lifecycle from beginning to end so staff can focus on critical day-to-day activities, rather than records management and compliance activities.
- 10 EXPERTLY TAILORED INDUSTRY AND DEPARTMENT SOLUTIONS**
The right content services platform will have expertly tailored solutions for industry-specific pain points and meet requirements by listening to your needs.



MYTH 3

Gathering information to support the ROI of the conversion and the downfalls of sticking with the status quo does not have to take a lot of time. And it can go a long way in making the case for a modern, more stable, extensible content services platform that will serve your organization well into the future.

Upper management will also appreciate a business case for conversion that compares ROI versus total cost of ownership (TCO). Often, it's the case that while you won't incur new direct expenses by keeping your current legacy system, you'll continue to pay for it indirectly and substantially through change management, risk mitigation and opportunity costs.

ASK YOURSELF THESE QUESTIONS TO HELP BUILD YOUR BUSINESS CASE FOR A STRATEGIC CONVERSION:



Are you missing out on opportunities to increase employee productivity, accelerate rote process throughput, improve customer service or attract and retain quality employees?



Does staying with the current solution represent risk to the organization?



Is your legacy solution unable to meet compliance and reporting needs or maintain and administer customizations?



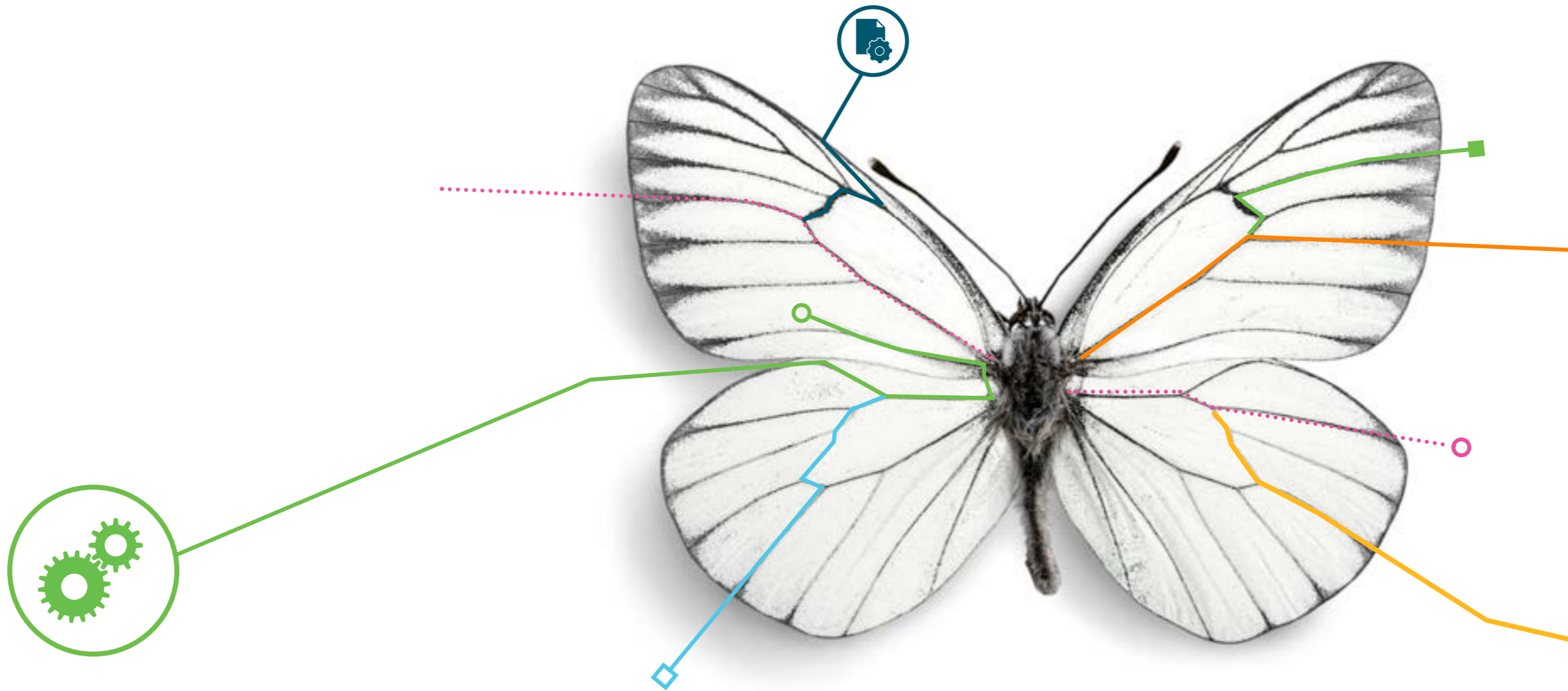
Can your legacy system adopt other technologies to support business process enablement in new ways — like through mobile technology?



Our previous automated merge process literally took hours to perform every night. It was extremely slow. With Content Composer, these notices — and we're talking anywhere from 2,000 to 3,000 at a time — get finished in a matter of minutes.”

Casey Greenwood

IT Supervisor, State of Montana Department of Labor and Industry



MYTH 4

The complexity of our legacy systems makes conversion to a modern platform too big of a risk



MYTH 4

THE COMPLEXITY OF OUR LEGACY SYSTEMS MAKES CONVERSION TO A MODERN PLATFORM TOO BIG OF A RISK

It's no secret that digital capabilities are advancing at an unprecedented rate. And the value of converting documents and data from legacy systems to a modern platform is undeniable, positively impacting key areas of every organization including:

- Enhancing security and the user experience
- Easing compliance, integrations and solution delivery capabilities

As a result, evolving and modernizing data strategies is a key priority for organizations in every industry.

However, the reality is most organizations are now maintaining multiple, aging content repositories — many times through acquisition. The effort to extract data compounds with age, number of systems and different types of systems. And since your organizational data is your most important asset after your people, it is critical to ensure 100 percent successful extraction accountability from your legacy systems.

You can simplify the process by looking to partners for help guiding the effort. From managing the project, to extracting metadata and documents from legacy systems, to importing to the new platform and the project management of all of it — experience matters.

Partnering with conversion experts who have proven experience with hundreds of systems minimizes uncertainty, reduces conversion time frames and removes the burden of risk for your teams surrounding your data migration needs.





MYTH 4

PROVEN STRATEGIES FOR CONVERSIONS — MINIMIZE RISK AND DOWNTIME

Effective conversion projects are not limited to successfully extracting data from legacy systems and importing it into modern platforms. They also include effectively modeling metadata to be at its best on the new platform.

When considering your approach for data migration efforts, consider partnering with a conversions expert who understands this complex undertaking and simplifies it for your teams. The value an expert brings to the project includes:

- Extensive experience extracting data from your old platform, minimizing risk of data loss.
- A deep understanding of strategic metadata methodologies, including mapping documents and data for optimal performance in your new platform, shortening migration time frames and delivering optimal outcomes.
- Proven project management success in data migration projects, even for large, complex projects with multiple databases and content repositories.

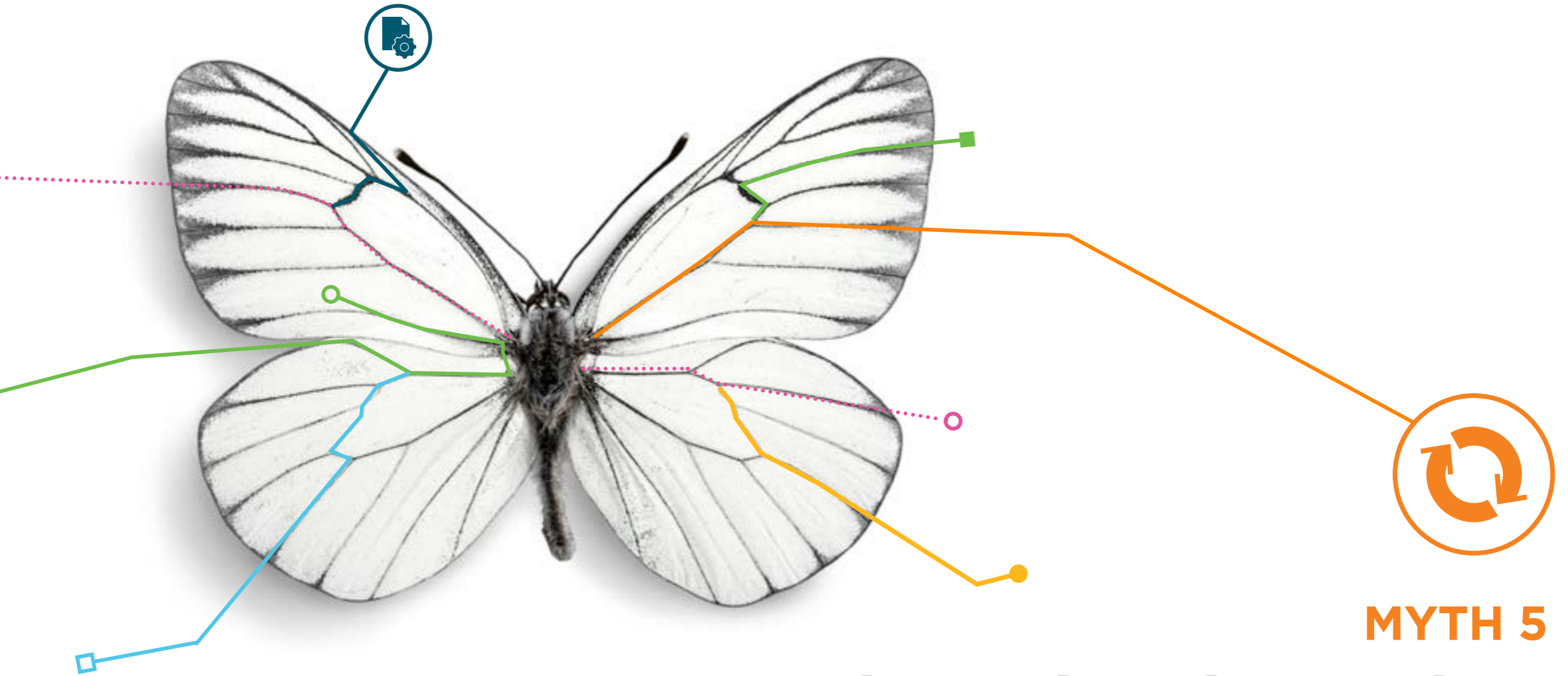
There are many systems out there. Working with a conversions expert considerably minimizes risk and downtime, as well as ensures your documents and data will be optimal for your new system, and poised to perform.





We had weekly calls with our primary Hyland contact. He took charge of documentation, organized meetings, created files with touchpoints, and gave us due dates. When things were done, he turned us loose and made sure he was available if we had questions. Making the conversion of 25 million documents and data from nine content repositories to a modern platform as easy as it could possibly be.”

Senior business systems analyst
Healthcare organization



MYTH 5

**A data migration project
will be too disruptive to our
business processes**

MYTH 5

A DATA MIGRATION PROJECT WILL BE TOO DISRUPTIVE TO OUR BUSINESS PROCESSES

You may be in a position where you know you'll have to migrate to a new platform due to limitations or uncertainties in your current system but do not want to disrupt the business process, or workflows that work.

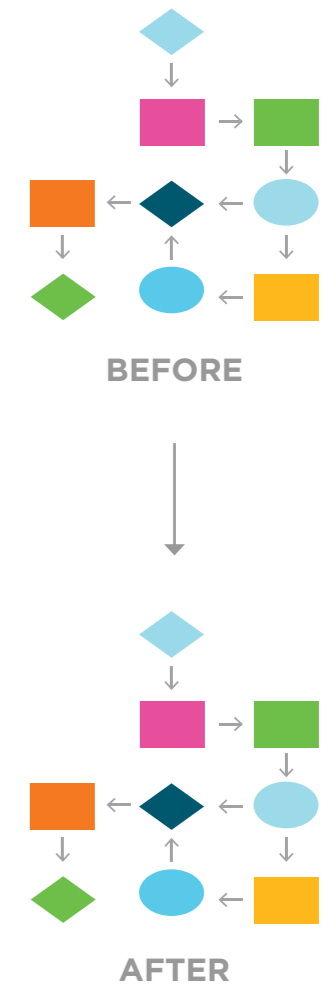
That's okay. You can work with a content services conversion expert whose process to extract and transform data does not superfluously affect the current environment. And despite what you may have seen or been told, your content does not need to leave your environment for extraction and data mapping.

SMALL CHANGES, ENORMOUS BENEFITS

Look for a vendor who can remove the risk of a conversion effort that forces unwanted change in document workflows, naming conventions and access. The vendor should provide insight into adjustments that will yield ongoing benefits in terms of extensibility, efficiency, security, governance and performance.

Research whether each potential vendor has experience in your industry and in the latest data-driven solution capabilities. In discovery discussions, explore what recommendations they have in terms of small changes that would benefit business processes.

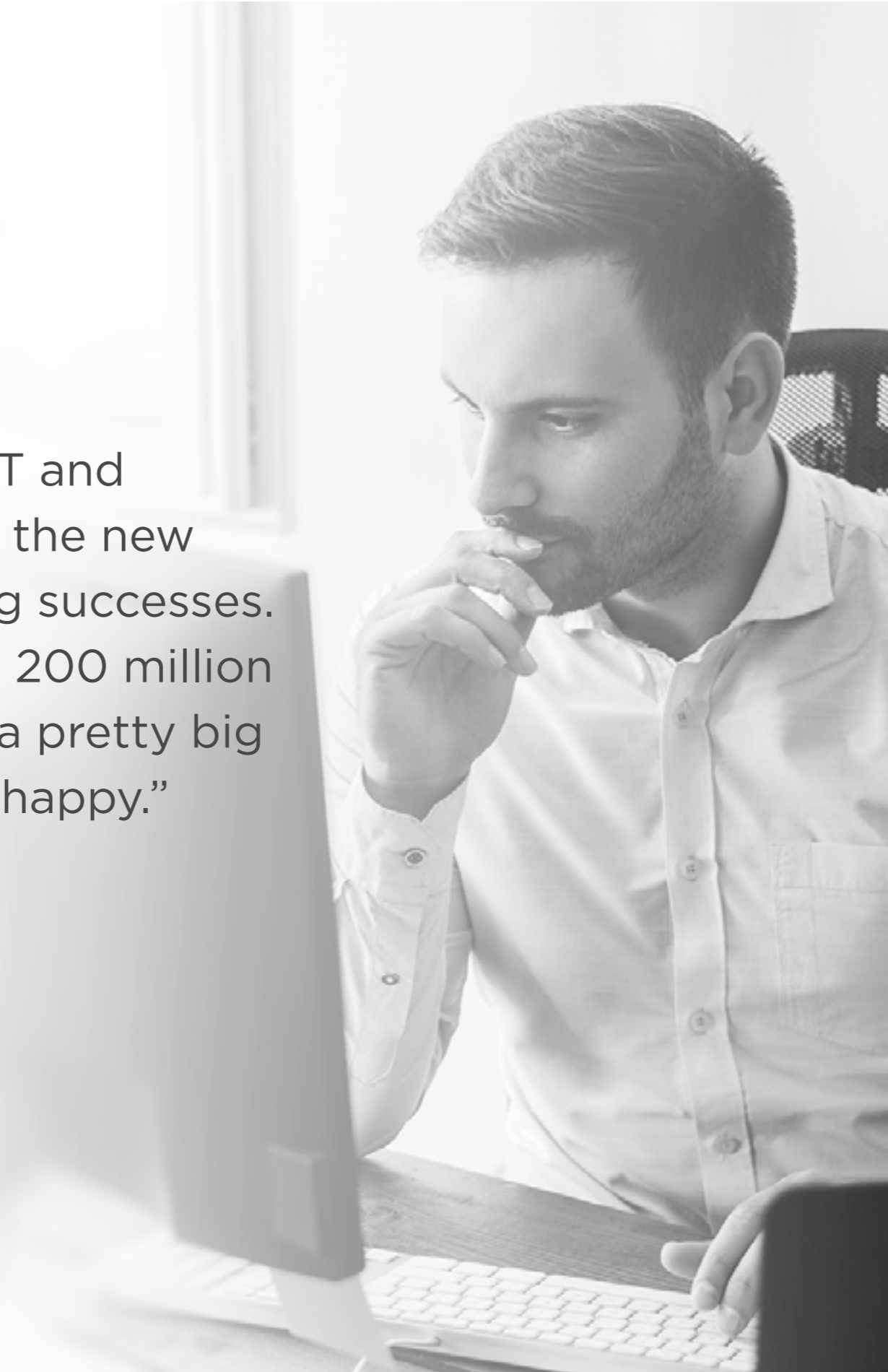
Often, small adjustments to workflows and organization of documents and data in the modern platform yield considerable value in terms of information accessibility, productivity and user enthusiasm of the new system.





After working with our in-house team and IT and the Hyland conversion team, the cutover to the new platform was where I think we had some big successes. We went live at midnight and had migrated 200 million documents by 2 p.m. that day. So that was a pretty big win. Our users were happy...leadership was happy.”

System analyst and OnBase administrator
Healthcare organization





MYTH 5

When moving to a modern content platform, ensure your vendor is not simply a software provider, but a trusted partner in delivering outstanding products and services — both now, and in the future. They should have proven expertise in both industry-specific solutions and departmental solutions.

For example, see some of the strategic solution areas that transform capabilities by streamlining day-to-day workflows and accelerating business processes:

INDUSTRY SOLUTIONS

Insurance

- Property and casualty
- Life, health and annuity
- Third party administrators

Higher education

- Enrollment management
- Advancement and athletics
- Senior administration
- Business office

Healthcare

- Health information management
- Clinical
- Patient access
- Patient financial services
- Health Insurance

Government

- Justice and public safety
- Health and human services
- Planning and public works
- Finance and administration

Financial

- Banking
- Wealth management
- Credit unions
- Lending

Other industries

- Arts and entertainment
- Construction
- Manufacturing
- Mining
- Oil and gas
- Retail
- Transportation
- Utilities
- Wholesale distribution

DEPARTMENT SOLUTIONS

Accounts payable

- Approval management
- Dispute resolution
- Invoice capture
- Invoice processing
- Vendor management

Accounts receivable

- Billing
- Credit and collections
- Dispute resolution
- Payment processing
- Proof of delivery
- Sales order processing

Human resources

- Employee file management
- Employee onboarding
- Employee relations
- Employee offboarding
- Policies and procedures

Contract management

- Amendments
- Approval and signatures
- Authoring
- Collaboration and review
- Contract requests
- Expiration tracking
- Obligations Management

Other processes

- Engineering change management
- Facilities management
- Procurement and purchasing
- Quality and process control
- Work order management



MYTH 5

THE VALUE OF EFFECTIVE CHANGE MANAGEMENT

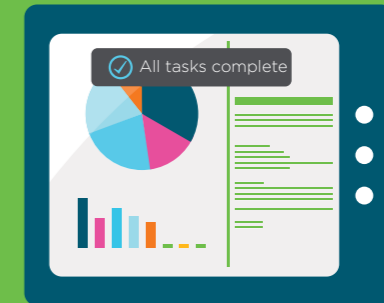
Effective change management can create a culture where instead of being resistant, users embrace solutions, because optimized solutions just make their lives easier. And their days happier and more productive.

You'll always find staff who are resistant to change, especially if it involves processes that impact their daily work. Especially business process workflows that currently work. However, migrating to a modern platform that has the technology, R&D support and capabilities your organization will require in the future does not mean that everything has to change today.

When working with data migration teams or consultants, make sure to discuss the departments that will be affected by the migration effort, especially if optimized data mapping will affect how people will do their work, and access the documents and data they need.

When communicating with end users make sure to clearly communicate the why behind the changes and the benefits you expect. Additionally, make soliciting honest feedback — and responding to it — a clear component of the data migration project.

It is a good idea to ensure potential vendors can help with the specific change management tactics your organization requires.



QUESTIONS TO ASK POTENTIAL VENDORS:

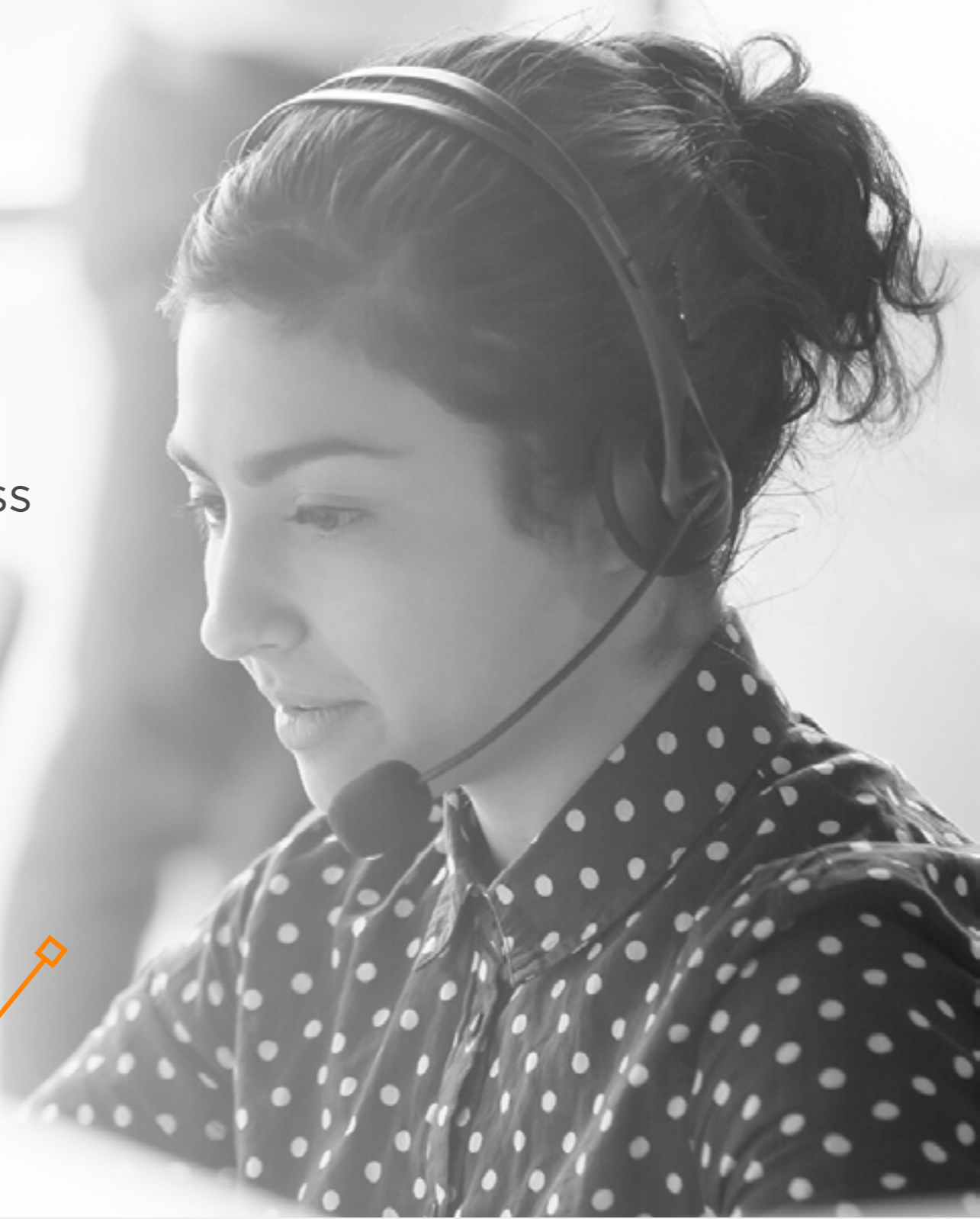
1. Can the same system be adopted by casual and power users?
2. How much custom coding is required to modify workflows as needed?
3. Can the solution scale to accommodate multiple processes across regional offices and locations?
4. Will the content services platform integrate with existing line-of-business systems?
5. What kind of end-user training and support is available?



Advisors now have one place to go for all student information. They also have access to all related documents — giving them a quick synopsis of each student.”

Tracy Weber

Manager, Document Management, University of Notre Dame





MYTH 5

According to Forrester's *Content at your Service* study, the following are obstacles to leveraging respondent organizations' content to drive decisions and strategy. What are yours?

32%

Difficulty converting content from old systems or storage locations

32%

Lack of available expertise

29%

Lack of executive support

22%

Difficulty integrating with other repositories or new business applications

21%

Employees spend too much time looking for the information they need

21%

Large amounts of critical content hides in information silos across the enterprise⁴



CONCLUSION

THE RIGHT PLATFORM ENABLES YOU TO TRANSFORM CUSTOMER EXPERIENCES

Digital capabilities enhancing security and the user experience — as well as easing compliance, integrations and solution delivery — are advancing at an unprecedented rate.

As a result, evolving and modernizing data strategies is a key priority for organizations in every industry. This often starts with consolidating organizational content and data from legacy, often siloed repositories and converting them to a platform that is appropriate for today's digital needs.

Conversions can be daunting, but they will continue to be necessary and often yield immediate high value. They also minimize IT sprawl and enable you to improve return on investment of your ongoing data and content management needs.

You can reduce uncertainty, project time frames and the burden of risk for your teams by looking to an experienced content and data conversion partner for guidance in ongoing conversion efforts.

ABOUT HYLAND'S CONVERSION SERVICES

A leader in content services recognized by analysts for its professional services, our Conversion Services consultants ensure successful conversion projects. Our teams have decades of experience with conversion projects of all scale, from hundreds of different types of content repositories.

From managing the project to extracting metadata and documents from legacy systems — and transforming data into a customized format that meets your exact needs — experience matters. To date we've converted data from more than 450 legacy systems, and optimized more than 12.5 billion documents to perform optimally in their new system.

ABOUT THE HYLAND PLATFORM

The Hyland content services platform improves your capabilities by making your content universe more user-friendly, connected and compatible with modern-day business. More than half of the 2019 Fortune 100 companies leverage the Hyland platform⁵. Every day, we deliver solutions that are:

- Expertly tailored to your needs and industry
- Intelligently automated so your team can focus on high-value work
- Agile and adaptive to support your evolving requirements
- Low-code and configurable without a developer's background
- Deployed in the cloud or on premises
- Designed for streamlining workflows and business processes

The right platform enables you to capitalize on opportunities to improve processes, and best serve your people.

Hyland®

For additional information visit [Hyland.com/Conversions](https://www.hyland.com/conversions)

To talk to a conversions expert, schedule a complimentary conversation by visiting [Hyland.com/TalkToAnExpert](https://www.hyland.com/talk-to-an-expert)

QUOTES

1. AIIM: Embracing Content Services Report
- 2-4. Content At Your Service: How Modern Content Services Platforms Power Digital Transformation, A commissioned study conducted by Forrester Consulting on behalf of Hyland, March 2019, (354 ECM decision makers (74 leaders, 72 followers, and 208 laggards) in the US, the UK, and Australia)
5. Information confirmed January 1, 2020