THE SIMPLE TOOL TO TRANSFORM INFORMATION MANAGEMENT CAPABILITIES

How a strategic roadmap illuminates the possibilities in your technology landscape

Hyland

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Introduction

Organizations around the globe are in a new reality. The efficiency at which IT, business unit and organizational leaders must strategically plan for the future — while at the same time transforming current business processes to meet growing user expectations — is unprecedented in today's digital age.

Mobile, secure immediacy is the new normal for access to information. From anywhere and at any time, users are increasingly becoming accustomed to turning to their mobile devices or other technology at their fingertips to find what they need from your organization. It's not just a cool, new, nice-to-have feature any longer; if you can't provide this experience for your users now and going forward, there are many who can and are ready to step in.

Technology is moving fast. How do you keep up?

The information management industry itself is on the move, and those tasked with delivering content or data-driven solutions are also facing an evolution. We're managing the shift from enterprise content management (ECM) to content services, often with multiple on-premises and cloud-based content repositories co-existing that require effective interoperability. Interestingly, these increasingly hybrid platforms are emerging as strategic paths for enduring capabilities that deliver what people need.

Read on to learn proven, predictable tactics, including how to leverage a tactical technology roadmap that simplifies effective information management, for true digital transformation.

#1 RISK

Businesses predict digital transformation to be biggest risk factor in 2019.

"Existing operations and legacy technology infrastructure pose a risk to companies that can't transform quickly enough to compete against companies that were 'born digital,' … This risk factor surged to the top spot for 2019, up from 10th place in the 2018 report."

The Wall Street Journal, based on a survey conducted in the fall of 2018, with respondent roles varying from board members to chief executives to chief risk officers

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We've grown organically and through acquisitions … We knew at some point we were going to be needing some type of technology that would help [with] improvements in processes.

Senior Vice President, Strategic Projects
Financial Institution

Harness the possibilities in hybrid realities

Hybrid information management is the new normal. Hybrid information management is content managed by multiple ECM or content services solutions and platforms, both on-premises and hosted in the cloud.
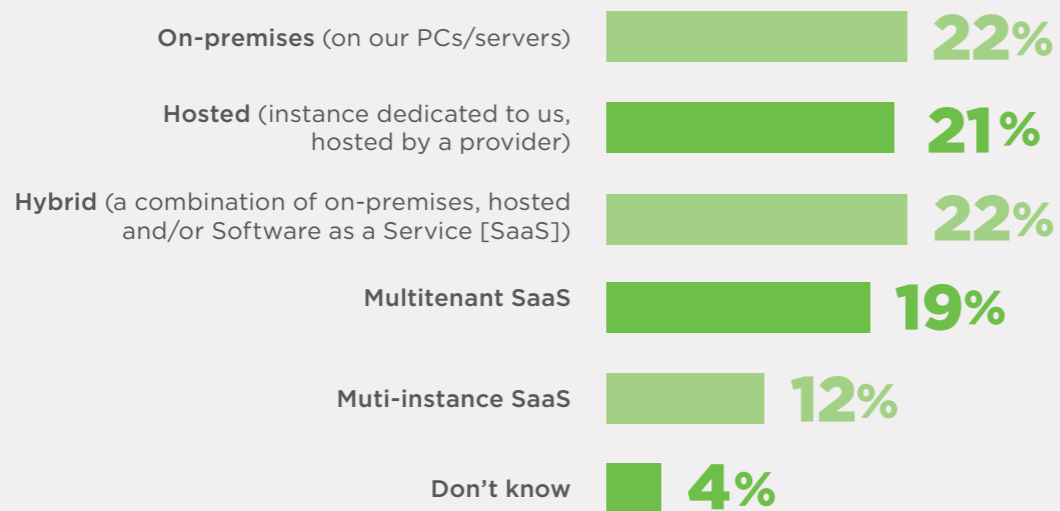
It can also be a strategic component to advancing your digital-first goals.

But to achieve this, you have to be able to see the data-centric potential for your unique organization, which requires comprehensive visibility into your information management landscape and content services capabilities. You also need to understand the flow of information across organizational business processes, including:

- **When and how data enters the organization, in structured and unstructured content**

- **How data is extracted from content**

- **Which business processes and systems need specific data and when**

- **The external users who need to access data, information or decisions resulting from these processes**

- **How to manage the data strategies for repositories and data stores inherited through acquisitions**

For many organizations in the near term, this means assessing a hybrid of multiple on-premises ECM or content services platforms, cloud-based solutions and integrations with other core line-of-business systems.

How does your firm plan to deploy or currently deploy ECM?

On-premises (on our PCs/servers)	**22%**
Hosted (instance dedicated to us, hosted by a provider)	**21%**
Hybrid (a combination of on-premises, hosted and/or Software as a Service [SaaS])	**22%**
Multitenant SaaS	**19%**
Muti-instance SaaS	**12%**
Don't know	**4%**

Intelligent Content Services Will Energize Your
Content Management Road Map: ECM In 2024
A commissioned study conducted by Forrester Consulting
May, 2019

Base: 1,650 global software decision makers whose firms are implementing
or have implemented the specified software technology
Source: Forrester Analytics Global Business Technographics® Software Survey, 2018

Does your organization access or use your ECM solution via mobile devices (e.g. phones, tablets)?

Yes	**36%**
No, but planned in the next 12 months	**35%**
No, not planned	**29%**

While only 36 percent of ECM decision makers report that their users access or use their ECM solution via mobile devices, this is up from 33 percent in 2016 and 22 percent in 2015.

Analytics, Cloud, And Intelligent Content Services:
Stay Ahead Of The Curve
A commissioned study conducted by Forrester Consulting
April, 2018

Base: 75 enterprise content management professionals
Source: Forrester's August 2017 Global Enterprise Content
Management Online Survey

The rapidly changing world of digital capabilities and user expectations

The necessity for speed, agility and a true understanding of what's at stake for — and important to — your customers is critical in keeping up with today's ever-increasing user expectations of availability and speed to information.

Organizations focused on the user experience, including integration, automation and mobile solution capabilities, have significant opportunities for differentiation.

However, understanding how or where to focus priorities for personalized user experiences is a challenge many leaders face. Especially in modern information management landscapes that can contain multiple ECM or content services instances — and whose content delivery extends to external customers, vendors or partners who require access to enterprise content.

There are other challenges, too, such as:

- **Balancing solution delivery priority for internal and external users**

- **Service-level agreements, regulatory and privacy requirements**

- **Extending the value of IT investments, controlling costs while expanding capabilities**

- **Mitigating risks**

A clear view into how processes are working today can enable you to see what data-driven solutions to prioritize first, by showing you which will have the highest beneficial impact for your organization and the people you serve.

ECM program leaders are now concerned about supporting their users' experiences across a range of mobile devices.

47%

named this as a top challenge when opening mobile access to content management applications.

36%

named redesign of processes for mobile as a top concern.

Analytics, Cloud, And Intelligent Content Services:
Stay Ahead Of The Curve
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While some have no strategy in place, others find it difficult to carve out the time they need to conduct proper assessments and evaluations to make the right decisions. Modernizing and strengthening their information ecosystems will be essential to their growth and success, as will automating their core business processes.

AIIM Embracing Content Services: Setting the vision for your organization
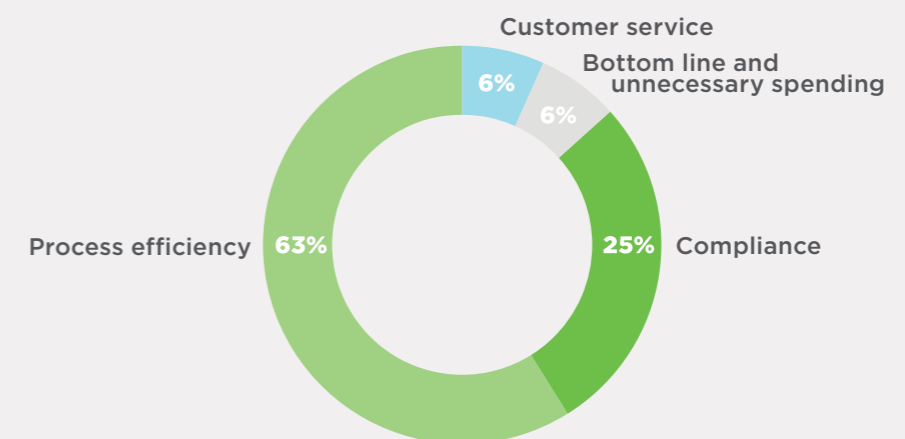
Assessing the current state of digital readiness

Assessing the information stores and uses in your organization is one of the most valuable exercises you can conduct in today's data-driven reality.

New digital capabilities are emerging every day, often disrupting the status quo across every industry.

If you have an understanding of your organization's data ecosystem and lifecycle paths, you have the distinct advantage to capitalize on emerging methods to advance your organizational goals.

When I think about how we manage our physical records and business information, I worry most about its impact on our:

- Customer service — 6%
- Bottom line and unnecessary spending — 6%
- Compliance — 25%
- Process efficiency — 63%

An overwhelming majority of respondents worry most about process efficiency, over bottom line and unnecessary spending, customer service and compliance. Interestingly, process efficiency directly impacts all of those areas.

Survey results from the Strategy and Delivery Series
The delivery of content services in the digital age: a readiness study in a new technology landscape.

66%

of respondents said siloed content across different repositories and applications is still the largest content-related business challenge.

AIIM: Embracing Content Services report

Identify quick wins and prioritize projects for the biggest immediate impact

Knowing the next best step for data-driven transformation is a critical factor for success, regardless of where you are in your digital information management journey.

How can you determine the next best step? You first need to know the current state of your organization's readiness for transformation.

A holistic view of the inner workings of strategic areas across your organization enables you to truly see the state of your readiness for data-driven transformation. This visibility enables you to identify quick wins that will yield the highest, most beneficial impact immediately — from the back office to customer facing areas, to processes conducted throughout the organization by knowledge workers and decision makers.

There is often a very real gap between what is possible and what organizations do with existing resources.

The simple, strategic tool that guides this effort

Even organizations with leading content services platforms in place may be unaware of opportunities to further integrate these solutions with line-of-business applications, automate routine tasks with integrated workflows or insert case-based custom views to certain areas of the organization.

A multi-year roadmap is a simple, strategic tool that guides this effort.

A roadmap is the culmination of a comprehensive information assessment of your entire organization or certain key organizational areas. This assessment does not just look at content assets, content-driven solutions or technologies. It also looks at all the people that may be involved, from the project teams to the users to the customers. It looks at how processes align with the goals that an organization is looking to achieve, and develops strategies and tactics for how to get there.

Research indicates that organizations do not need an enormous budget for transformative innovation. Simply understanding how to best put your data to use can be the key component to success.

Technology

Assets

People
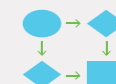
Proceses

Goals

Assessing how content is used enables you to identify and address process, service and security gaps.

Digital leader or digital laggard?

Transformation does not always require enormous budgets. Many times, it's what you do with the data and technology already in place. For example, in its article "'Digital laggards' must harness data or get left behind," *CIO.com* discusses the Harvard Business School whitepaper *The Digital Business Divide.*

"The article states that CIOs may be tempted to argue that digital leaders boast bigger budgets than their laggard counterparts, but ... the highest performing companies have technology budgets on par with digital laggards, with average IT spending as a percentage of revenue at 3.5 percent, compared to 3.2 percent for their counterparts.

The difference ... lies in how companies put their data to use. Using their data platforms, leaders have implemented a comprehensive data acquisition strategy and differentiate themselves from competitors.

Digital leaders are two-and-a-half times more likely to harness real-time data and analytics to deliver tailored customer experiences and are also two-and-a-half times more likely to use analytics to prescribe business actions that limit customer turnover."

-*CIO.com,* 'Digital laggards' must harness data or get left behind

When to consider an information assessment and roadmap

1 You want to gain an in-depth look at the return on investment (ROI) and total economic impact of current or proposed content services solutions

2 Prior to implementing new solutions, expanding the reach of existing solutions or converting to a modern content services platform

3 When you need a tactical, multi-year plan aligning technology and business-level initiatives to executive vision

4 Your teams find significant challenges handling content services program expectations due to limited resources, awareness and support at the enterprise or executive level

5 You want to assess waste in processes across the enterprise or gaps in solutions versus business needs

6 When productivity decreases because user adoption is not maximized

7 You want to uncover bottlenecks at certain times or peak times of system usage

8 You are facing a constant cycle of conflicting and competing project priorities

9 Organizational solutions tend to be deployed to meet the pressing needs of one business area, contributing to data silos

10 Your organization lacks a long-term plan — including proposed investments and effort estimates — for your digital transformation initiatives

A tactical roadmap guides decisions, strategic solutions and stability

Often, organizations will implement software before fulling analyzing the impact it can have on key business processes. This can leave strategic optimization areas in the dark — including interoperability, automation and best-in-class user experiences.

Assessing your information management landscape and developing a strategic roadmap built for your organization's unique needs can be a significant differentiator in your digital transformation potential.

It can shed light upon areas of opportunity and guide you on the right path to make your organizational vision a reality. It also provides hands-on guidance for your internal teams to increase their solution architecture and delivery capabilities, simply by following the blueprint defined by experts who understand your business and the content services industry.

An information assessment exercise should have clear project milestones and goals, and should result in a tactical roadmap that identifies quick wins, ROI projections and long-term goals. It should also clearly define roles, budgets, technology and change management strategies to ensure successful outcomes.

You know your business better than anyone; the key is to understand the content services capabilities that will best serve your processes.

An optimal information assessment is a collaborative exercise

This effort works best in collaboration. It should involve representatives from all areas of your organization dependent on data entering the organization.

And, while this may not seem like an easy or achievable task for many organizations, two project components promote successful outcomes in an assessment effort:

1. **Participation from key stakeholders in your organization who can define the overarching goal and contribute to the discovery effort**

2. **An authority on emerging information management and content services strategies leading the effort, who can help guide who should participate, project manage the exercise and deliver a tactical, go-forward roadmap at its conclusion**

This yields the best comprehensive results and minimizes the time required by internal stakeholders.

Follow a guided process for the best outcomes

While some organizations elect to take on this challenge internally, it can be a lengthy process to design and conduct the exercise, pulling key team members away from core duties to project manage and deliver actionable results that include best-in-class content services recommendations.

When you collaborate with an authority on industry-specific information management solution delivery, you'll have a powerful understanding of both what your users need and the capabilities of modern content delivery opportunities — including integration, artificial intelligence (AI), intelligent capture and mobile solutions.

Built on input from stakeholders across the organization, an information assessment roadmap also identifies and clarifies expectations across the board. This promotes user adoption, with with enterprise technology in place to accelerate organizational goals. It also enables you to grow customer and partner loyalty with quick wins and innovative solutions that improve experiences for those you serve.

How to begin: Assessment phases

Working with an industry authority with content services expertise, you can anticipate three basic phases in an information assessment to yield an effective roadmap.

1 THE PLANNING STAGE
Determine the focus areas and any defined goals

- Collaborate with the information management expert to formally initiate the project.

- Together, establish the assessment plan, agenda, preparedness, questionnaires and research.

- Schedule onsite discovery and plan for engagement lifecycle.

2 ANALYSIS
Examine your specific processes, guided by content services experts

- Following the lead of the information management expert, collaborate in the onsite evaluation of people, process, content and technology.

- The information management expert will define gaps between findings and where you want to be using risk, readiness and maturity models.

- They will analyze findings to uncover solutions that will provide the greatest benefit.

- They will propose order of delivery, rationale, costs and commitments.

3 DELIVERY
Implement the tactical roadmap to achieve organizational goals

- A comprehensive document will include an executive summary, findings, approach, investments, solutions and best practices.

- The information management expert should also deliver an onsite executive presentation summary of findings and recommendations.

- Collaborate to develop an action plan to hold both the information management expert and your internal teams accountable to execute next steps.

The roadmap: Recommendations should include strategic, industry-specific solutions as well as guidance for general areas of improvement. This includes prioritizing and simplifying processes, and encouraging interoperability through integration between existing and emerging systems and hybrid architectures.

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The [information assessment] really helped outline for all of the executive team and the people on this process really what are some pain points that we were all incurring, but at the same time where we could start.

Senior Vice President, Strategic Projects
Financial Institution

Preparation for the assessment

Digital transformation requires alignment of business unit leaders and decision makers within the organization in terms of technology priorities.

Many times, conducting an assessment requires some prework to ensure everyone understands the current state in terms of readiness and the best next steps to take.

Assessment prework exercise

A good way to prepare for these conversations is to evaluate several key components that support data-driven success, regardless of your in-house technology or industry.

1. **Answer the questions in this readiness scorecard and calculate your results to obtain your readiness score.**

2. **Once you have tabulated your score, you can learn what it means and obtain strategic next steps by watching this on-demand webinar.**

Watching the webinar requires a time commitment of less than an hour and can provide you with insights that inform conversations leading up to an assessment. This prework exercise also assists the planning stage of an assessment.
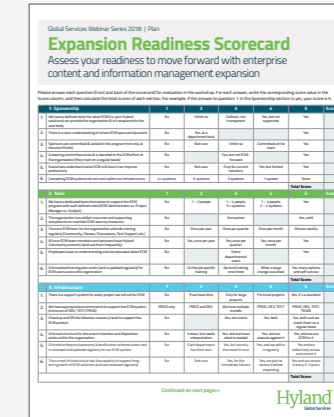
Click to access the scorecard

When was the last time you or someone took a comprehensive assessment to stand back and look and everything that you are or are not doing with your content services solutions?

44% We do this ad-hoc.

39% We've never done this.

17% We do this regularly as a partnership between our business and technology teams.

Out of the more than 60 percent of respondents who periodically evaluate current capabilities, prioritize opportunities and identify gaps in their Hyland solutions, nearly 20 percent conduct these evaluations as a routine practice between business unit stakeholders and IT teams.

Survey results from the Strategy and Delivery Series
The delivery of content services in the digital age: A readiness study in a new technology landscape.

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Having [the Hyland team] come in and help us understand how we can break it down ... roll this out to the entire bank, what would our timeframe be, those types of things really helped us in saying okay ... this is something that we can handle.

Assistant Vice President, Project Management
Financial Institution

Takeaways from an effective information management roadmap

- Prioritized quick wins

- Recommended training/staffing

- Investment estimates

- Content services maturity score card and readiness

- Product application analysis (enterprise-wide)

- Resource management plan

- Deployment best practices

- Effort and duration estimates by project

- Maturity analysis

- Current and future state analysis

- Executive-level analysis

- Strategic program recommendations

- 3–5 year roadmap and cost estimates

- Deployment options

- Recommended approach and best practices

- ROI findings

- Risk assessment

- Opportunity prioritization analysis

"

I think certainly [the effort] has helped us change our organization. And I think organizations that are going to be successful are organizations that are constantly evaluating and re-evaluating how they're doing things.

Executive Vice President, Chief Operating Officer
Financial Institution

Critical components for a successful digital transformation

Excerpt from the Forbes *article, Why Digital Transformations Fail: Closing The $900 Billion Hole In Enterprise Strategy*

Transformation success is completely dependent on employees working together to achieve the program's goals. The whole company, not just a few people on the same team, must unite to drive success. Unfortunately, most organizations are siloed, with functional areas and business units struggling to communicate, coordinate and collaborate in relation to transformation initiatives.

It gets worse. The diverse tools, data repositories and workflows across disparate functions exacerbate enterprise disorganization, resulting in a work ecosystem that is largely analog and siloed. Hence, a relatively small portion of a knowledge worker's time — 39 percent according to our study — is dedicated to their primary job duties.

Digital transformation is about people

As technology leaders, we have a tremendous challenge before us. I believe Peter Drucker framed this challenge quite well when he said: "The most important, and indeed the truly unique, contribution of management in the 20th century was the fifty-fold increase in the productivity of the manual worker in manufacturing. The most important contribution management needs to make in the 21st century is similarly to increase the productivity of knowledge work and knowledge workers."

To meet this challenge, we must rethink how our teams work together across the enterprise and apply a modern approach to work with new systems and models, enabled by the right tools. Only then can we ... finally enable our teams to focus on what we actually hired them to do: dream, create and innovate.

- Steven ZoBell, Chief Product and Technology Officer, Workfront

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We've learned so much not just from a systems standpoint, but our business processes and just how much better we can be.

Assistant Vice President, Project Management
Financial Institution

Conclusion

Regularly evaluating solution sets across your content services platform is a great way to keep a close eye on what consumers expect, to support and advance the goals of the organization, and to keep up with market demands.

We are in an unprecedented era of technology-enabled innovation, where the pace of digital transformation is creating significant opportunities for organizations in every industry. Technology leaders find themselves at a critical juncture in this time of digital transformation, where it is essential to capitalize on digital innovation in order to meet user expectations and keep pace with peers.

The ability to harness organizational data and unstructured content entering the organization in numerous ways — and provide secure solutions that meet the exact needs of your processes and people — has never been more important.

Simple steps, like conducting an information assessment and illuminating the state of your information management landscape, can ensure you attain the organizational goals paramount to succeeding in today's data-driven marketplace.

Hyland's Consulting Services

Adapting with rapidly evolving user expectations for information access is critical and requires robust technology platforms — but also the capabilities to deliver transformative solutions. And to get to where you want to be, you need to know where you're coming from.

Hyland's expert consultants are here to help you get started with your information management journey and guide you along the way, providing support as your solutions mature and expand.

Learn more about Hyland's information assessment services by reaching out to your account manager or visiting **Hyland.com/planning.**

600+
HYLAND GLOBAL SERVICES EMPLOYEES WORLDWIDE
Ensures your needs are met wherever you're located

2,000+
UNIQUE PROJECTS ANNUALLY
Demonstrates our ability to deliver the results you need

10,000
UNIQUE LIFETIME CUSTOMERS
Proves our commitment to providing you with exceptional service

300+
HOURS OF TECHNICAL TRAINING
Guarantees you receive the best and most knowledgeable industry expertise

About Global Services

Hyland Global Services is committed to helping our customers leverage their talents and technologies to succeed in your goals.

Since 1991, Hyland's driving force has been to empower you to continually improve work processes by making information that exists in you organization work better for you.

We've been successful in empowering our customers for more than 25 years by working side-by side with you, listening to the real-world challenges you face and collaborating with you to develop industry-leading information management solutions that enable you to attain critical goals.

We succeed when you succeed.

INDUSTRY RECOGNITION

In its 2018 Magic Quadrant for Content Services Platforms Report, Gartner named Hyland as a Leader based on our completeness of vision and ability to execute.

Click to get the report.

Learn more at Hyland.com/Planning