DIGITAL TRANSFORMATION:
A traveler’s guide for the journey
The journey from digital information to digital transformation

Every organization has digital information and supporting systems, and often have for many years. However, many still struggle to transform their operations. It’s not just about making information available digitally; it’s about what organizations do with that information — making decisions, driving processes and serving customers.

To be truly transformative in improving employee productivity and customer service, organizations need to transform how they think about their key enterprise information. Any digital transformation initiative will only succeed if there is a holistic approach to standardize the way that information and content is managed, used and shared across the organization.

In this eBook, you’ll learn more about the concept of digital transformation, the role that content and information plays, and how to get started on your journey. You’ll hear from Hyland experts about their experiences with the evolving technology landscape and learn how you can positively impact your organization’s people and processes as you pursue your own digital transformation.

>>> Let’s begin
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PART 1
AN INTRODUCTION TO DIGITAL TRANSFORMATION
VIEW FROM THE TOP:
A time of transformation

by Bill Priemer, president and CEO, Hyland
If there is one word that could define what’s happening in business right now, perhaps “transformation” is it. Certainly, the term defined as “a thorough or dramatic change in form or appearance” not only sums up what’s happening in the information management industry; CIOs and IT leaders are also transforming their thinking about how they manage information digitally across their enterprises. Both transformations are connected, presenting tremendous opportunity for businesses today.

**ECM transformation**

The field of enterprise content management (ECM) continues to transform as it becomes clear which companies are investing in innovation, and which seem to be simply hoping that inertia will keep their existing customers from switching to modern platforms. In fact, analyst firms like Gartner are now redefining the market, retiring the term ECM for the broader term, content services, to discuss the way we interact with content. This term better encompasses the true transformative nature of the solutions that providers like Hyland are delivering to customers.

**Digital transformation**

There’s no doubt that digital transformation is a hot topic in business right now. Organizations have been managing information digitally for decades; however, they now realize that simply storing information digitally will not enable the degree of agility, efficiency and effectiveness needed to thrive in an environment of constant change and disruption. And frantically buying a mish-mash of niche cloud applications has the potential to do more harm than good by creating more silos of information.

Digital transformation is more of a mindset shift than any individual technology investment. Some of the most visionary CIOs are consolidating their environments onto a handful of core platforms to manage key areas of their businesses, such as sales interactions, financial transactions and HR information.

They are quickly realizing that there is still a tremendous amount of content, processes and casework managed by niche or outdated applications outside of their core platforms. These multiple, disconnected silos of information make it impossible to provide a complete, centralized view of information to their employees and the people they serve. That’s why OnBase, as a single enterprise information platform, is such a key part of the journey toward digital transformation.

Companies embarking on digital transformation journeys are becoming the disruptors of their industries. But the question we must ask is, “Do we want to lead the transformation, or do we want to be disrupted?”

There’s no doubt our industry is experiencing one of its most exciting times. Last year marked Hyland’s 25th anniversary as a company, and we can’t wait to see what transformation the next 25 years will bring!
DIGITAL TRANSFORMATION: Fantasy or reality?
by Glenn Gibson, director of product and solution marketing
I recently had the privilege of hosting a roundtable session at an IT conference on the topic of digital transformation. An interesting mix of information experts, vendors, business and IT professionals attended this session, from a wide variety of industries and backgrounds.

The first question for the group was the title of this post — Is digital transformation a fantasy or a reality?

Here’s the synopsis of the discussion.

**It’s a reality and cannot be ignored!**

This was the definitive answer in the room. However, the group interestingly raised the idea that this has been a reality for a long time. What we are experiencing now is the next phase of a continuum, which started around 25 years ago with the digitization of paper, and now, encompasses so many more elements of organizational operation.

The image displayed on the “Wikipedia” page dedicated to this topic well illustrates how widely encompassing this phrase has become, by showing a traditional British telephone box painted black with the “telephone box” sign replaced with the label “Wi-Fi hot-spot.”

C-level executives cannot ignore this trend. In order to survive and thrive as an organization, it’s imperative that going digital is an essential step.

**A feeling of déjà vu**

Perhaps because of the enterprise content management (ECM) experience and heritage in the room, I suppose it wasn't surprising that the conversation began to circle around the cost, time and headcount savings possible once an organization manages information digitally.

What were to me classic tales of efficiency gains — from digitizing and automating processes — being discussed as examples of the benefits of digital transformation. It sounded very much like the same value propositions and examples that we have used to explain the benefits of ECM for many years.

When we discussed a question relating to the relationship of digital transformation to the concept of ECM, the consensus in the room was that the idea of ECM — managing digital content in a centralized location with governance, controls and automation — is an essential part of any digital transformation strategy.

But it goes beyond ECM. Organizations need a range of content services — from intelligent capture to process automation to case management to collaboration tools — to truly thrive in the shifting technology landscape.

**The cold, hard truth: Not all organizations need to transform**

This is where the conversation really got interesting. The group started discussing the reality that the only companies that really have to undergo a “transformation” are the ones that have been in business for a long time — those that have a legacy of paper-based processes, outdated software applications and old-fashioned architectures. They have to re-imagine how they operate, rethink the software needed to support their initiatives and redesign their information strategies.

As one participant noted, “A digital backlog is hell.”

Continued >>
Born digital: A competitive advantage

Conversely, some of the biggest new disruptors in the marketplace simply don’t have to undergo a digital transformation as they have been born in the digital age. They have the latest and greatest digital tools at their disposal, often with their businesses built around the very capabilities these tools offer.

I was blown away, for example, when my brother showed me how he could buy a soda or pay a parking meter by text message. Text message! The cost showed up on your phone bill.

Suddenly, Latvia felt very cutting edge, and the UK felt like it had a lot of catching up to do.

So, for those leaders today who are thinking about their digital transformation strategy, this simply cannot be a future fantasy idea. The reality is that they MUST transform, and do so quickly to respond to changing consumer demand, changing technology and changing competition.

I used an analogy to illustrate this. My brother moved to Latvia around 1994, and when we went to visit, it was like stepping back in time. Old-fashioned stores where everything was behind the counter, no supermarkets, no parking meters on the street or many of the things I’d taken for granted growing up in the UK.

However, as Latvia joined the European Union and started investing in its infrastructure, it was not burdened with transforming an existing and aging infrastructure. Latvia simply implemented the very latest available technologies.
PART 2

PRACTICAL STEPS TO TAKE ON YOUR JOURNEY
DIGITAL TRANSFORMATION SUCCESS:
It’s more about people than technology

by Glenn Gibson, director of product and solution marketing
As noted in my previous article, during the roundtable I hosted, participants explained that digital transformation is, in fact, a reality. In this article, I’m sharing the advice the group provided when I asked, “What are the biggest roadblocks to digital transformation?” and “What are some essential steps to success?”

What I’ve found most surprising from the entire discussion was that, while the topic at hand was technology-focused, all the steps to success involved people: The users, the executives and the departmental managers.

**Step 1: Get buy-in from your users**

It is probably not surprising that this was the very first thing mentioned in the room. Anyone who has ever worked on deploying any kind of technology project will concur that user buy-in is A MUST. 

“If you don’t have user adoption, it doesn’t matter what you build,” one participant said.

That sums the thought up nicely.

Some ideas brought forth to get user buy-in were: “Make it dead simple” and “Get people excited about it, explain the benefits to them in their language.” This is the classic WIFM “What’s In It For Me?” angle.

Of course, these things are often easier said than done, but it’s definitely not a step that you can ignore. Digital transformation might be a newer concept, but getting buy-in from your end users is a concept that’s as old as the hills. Just make sure you actually climb that particular hill during your transformation.

**Step 2: Ensure there’s executive alignment**

“Not having a coherent vision” and “Not having consensus on the vision” at the executive level were observations shared by people in the room when discussing reasons that digital transformation initiatives have faltered.

While discussing this topic, several ideas were put forth to position the value of digital transformation to an executive. One attendee mentioned the concept of tying the initiative into a tangible outcome that the executives could relate with.

To illustrate the point, she shared an example from her experience in banking, where a successful digital transformation initiative included implementing self-service kiosks in branch offices, which ultimately reduced the number of tellers from six to two, making the branch more efficient.

This brought up the sensitive question of “headcount reduction,” and the possible implications that a digital transformation initiative could result in the elimination of jobs. This touchy subject was certainly not a new concept for the folks with enterprise content management (ECM) experience in the room.

The CDIA+ training and certification I took back in 2005 discussed this very topic in the context of implementing an ECM project, where the project of digitizing paper often resulted in the elimination of some paper-intensive job roles. Even all those years ago, the core ECM training...
Digital transformation success: It’s more about people than technology

Wisely proposed that “headcount reduction” would rarely, if ever, be stated as the main driver of a project like this, unless of course the organization was in a crisis and needed to slash costs.

Instead, the much more forward-thinking positioning to executives of “repurposing employees to higher value roles” was suggested as the value proposition. This is certainly as relevant today as it was then.

If a company is looking to transform, by the very definition of the word, it is not simply looking to remain stagnant – accomplishing exactly the same amount with fewer employees. Surely, it’s a much more compelling story when the value is in the future growth of the organization and how this initiative will help to accomplish more with the same headcount number.

This was definitely the consensus in the room.

So, the second recommendation from this group was to ensure there’s a shared vision and goal at the executive level. You can accomplish this by tying the initiative to company goals such as growth potential, improved customer service and increased job satisfaction, and by agreeing on specific areas of the business to address in an agreed-upon and prioritized order.

In fact, one person in the room had the new position title of “Director of Digital Transformation.” Staffing a role like this is well worth considering to ensure that there’s alignment at the executive level. This would help support a people-centric approach to a digital transformation.

Step 3: Don’t hang your managers out to dry

The discussion up to this point revealed an interesting dichotomy. On one hand, we need our users to be excited and to buy in to our digital transformation vision, and on the other, we need to acknowledge that this will inevitably affect individual job roles. Who, then, needs the most support of all?

Managers. These are the people who have to motivate and inspire their teams while delivering results and meeting the expectations of their superiors.

It’s the managers who have to deal with the word most often associated with change — fear. “People fear change” was a sage observation shared in the room. It’s not only the users who may fear the change, but also the managers themselves who carry the pressure to “make it work.”

Whoever is leading the digital transformation project should ensure that the organization provides managers with the support necessary to lead their teams through the change, gives them a clear understanding of the vision, and supplies them with tools and talking points to help manage their teams throughout the transformation.

Going back to the example shared earlier, where banking kiosks ultimately eliminated a number of bank teller positions, some very useful and interesting information came to light in that discussion. There was a known 40 percent turnover rate in that particular job role, which meant that the role was not very fulfilling to do and exhausting to continually staff.

What this digital transformation initiative ultimately achieved was to off-load the boring, transactional work to the kiosks and transform the role of the teller to being an advisor to the customer. This resulted in lower turnover rates and increased job satisfaction for the remaining tellers, while eliminating the perpetual hiring tasks the manager had to do to keep the role filled.

Surely, setting these kind of expectations up front with the management team and arming them with tools, training, and talk tracks to help displaced employees find new opportunities and guide remaining staff to success would be in everyone’s best interests.

So that was it. The steps to success in digital transformation have a lot less to do with technology than they have to do with people. We can all rest easy; the machines are not totally taking over the world.

Not yet, at least.
3 STEPS TO SUCCESSFUL DIGITAL TRANSFORMATION

by Jaclyn Inglis, product marketing specialist
IT professionals are discussing the concept of digital transformation more and more, but the question is: How do we define it? And is it merely a buzzword or is it the new paradigm and standard for business in the modern world?

At a recent IT conference, attendees referenced this topic often. But during a roundtable I attended, they specifically discussed the topic’s true relevance.

Digital transformation is a reality. But what does that really mean?

Though the consensus in the room was a resounding “yes” to the question of the reality of digital transformation, the definition seemed to differ depending on the person — highlighting the state of digital transformation today. It’s a changing landscape, both in business needs and technological advances.

Digital information is not digital transformation
One representative in the room brought up digitizing paper, claiming digital transformation has been around for decades and is nothing new, simply a new buzzword.

But another questioned if digitizing paper was true digital transformation. This person claimed today's world requires digitization of entire processes, not simply the information, and digitization of information can no longer be the only focus. Concurring, another attendee highlighted that the way we communicate has far surpassed simply paper-based communication.

Because of new communication tools, information and content is now born digital, not transformed into digital, creating new problems and, in essence, a need for continued and evolved digital transformation.

The next step: Cloud and mobile
With the backdrop of understanding this continuum of digital transformation, the group discussed the competitive landscape. Specifically, an interesting observation revealed that businesses born today are born digital — with hot topics like cloud document management and mobile content management at the core of how these new businesses develop processes.

This poses a new threat for organizations still struggling with turning outdated, paper-based processes into modern, automated, completely digital functions as their new competitors avoid those struggles entirely. But don't worry, here are some tips for success.

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This type of transformation is meaningful both for the goals of the organization and individuals' careers.

There seems to be no question digital transformation is a reality, not only involving the digitization of information, but also digitization of the entire business. With the investment and change it brings, it is critical that you create a strategy not only for the transformation itself, but for communication around it as well.

To set yourself up for long-term success, you may want to hire a Director of Digital Transformation—a new role that is surfacing in organizations around the world.

As I stated earlier, having a clear vision that includes a cost-benefit analysis will answer some questions before stakeholders ask them, generating enthusiasm and gaining acceptance. But the attendees referenced the importance of understanding your audience.

For instance, the C-suite may be the correct audience for a high-level vision statement including examples of potential ROI within specific processes. One attendee picked a process involving a single document—a type of customer-facing form that is uniquely completed and processed over 35,000 times over the course of a year.

He estimated the cost to the organization for each time it processed that form. The math of potential savings wowed his executives.

For individual employees the transformation might impact, he brought up the importance of explaining the change in their terms—highlighting that the transformation can relieve them of repeated, mundane tasks and free them for more meaningful work.

### 3 steps to successful digital transformation

#### 1. Create a clear vision

Attendees emphasized the importance of preparing a digital transformation vision for their organizations. That includes some big questions:

- How do you envision business changing and why implement this change?
- How extensive could this transformation be in terms of changing job roles?
- How extensive could this transformation be in terms of changing processes?

One attendee highlighted how important the clear vision was in discussions with the C-suite at his organization.

#### 2. Don’t try to boil the ocean

A theme not just in this discussion but throughout the conference, attendees recommended starting small. Trying to transform everything at once can be chaotic and more disruptive than helpful.

They recommend picking a process that could quickly and easily show ROI. The initial success and tangible ROI can make the entire vision that much easier to sell to stakeholders.

#### 3. Focus on people, speak to your audience

“People” continuously came up as the leading roadblock to successful digital transformation initiatives. But the group agreed that at the core of solving this problem was strategizing communication of the transformation.

This type of transformation is meaningful both for the goals of the organization and individuals' careers.

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PART 3

MILE MARKERS DENOTING YOUR PROGRESS
DIGITAL TRANSFORMATION:
Your content in disguise
by Glenn Gibson, director of product and solution marketing
We are transformers. As technology professionals, it is all of our responsibilities to continue to push business forward and transform to stay relevant.

Many parallels can be drawn between the requirements of true digital transformation and the story of the “Transformers”—the powerful characters who can convert from mundane objects into powerful robots.

Like Bumblebee — the dusty old Transformer Camaro — a content strategy that includes using document management tools, file shares and email — things that were revolutionary 20 years ago — might still be functional. However, a strategy based on those tools alone may no longer offer a competitive advantage because they are no longer the powerful, efficiency-increasing tools they once were.

So, we must transform again. Because digital information does not equal digital transformation.

The transformative power of one
Creating an enterprise vision for managing related digital content, where storing content for the sake of storing content, is no longer a valid concept. Instead, you must deliberately and intelligently connect and present content in a single, complete view.

In the “Transformers” story, there are three signs for the young protagonist, Sam, that the dusty old Camaro could transform into an intelligent, world-saving robot. First, the car began to drive itself; second, it could intelligently speak or play music to express its mood; and third, it finally transformed its entire appearance.

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Just like there's an army of Transformers, it's important to realize that this evolution can involve an army of multiple technology solutions. And, like the army of Transformers, it is critical that as you digitally transform, you make sure all your systems are integrated, ensuring you have truly connected your business-critical content and information.

3 signs you’ve transformed

IT professionals should look for the same signs when interacting with their content to indicate they have completed a true digital transformation. Here’s what you should look for:

1. Content that drives itself
   When you have fully transformed your content and information management strategy, content will start to drive itself throughout the enterprise. Once captured into a central repository, it will find its way to the appropriate personnel, wherever they might be, with specific business criteria automatically pushing it through its journey.

   At this stage, any “human questions” should be answered digitally by technology. This includes questions like, “Who should this document go to for approval?” or “Is there a related document already in our systems?”

2. Content that speaks to those who need it
   When an organization is digitally transformed, systems should send notifications to the appropriate staff or audience when something has changed, such as someone submitting a form. Moreover, as someone needs to review or act on a piece of content, that content should find its way to that user — through email notifications that give them all they need to complete the task at hand, including all related content.

3. The content transforms in appearance
   Digital information is not digital transformation. That transformation is only complete when the experience of users interacting with that information has completely changed. It might seem like a small difference when you look at the words, but as our customers know, the rubber hits the digital transformation road when users have instant access to the digital information they need, when and where they need it.

   Just as important, the technology you utilize should provide views of information that help put context around content — through visuals like dashboards and maps. Users should have a clear picture of information that helps them immediately make decisions instead of needing to analyze individual pieces of content.
DIGITAL TRANSFORMATION:
Welcome, we’re happy you’re here!

by Ed McQuiston, executive vice president of global sales and marketing
Industry terms come and go. We all know this. But this one. This one feels right. Only, we think it’s a little late.

You see, we’ve been helping customers with digital transformation for more than 25 years. All the way back to 1991, when we began archiving print reports digitally, we have been ushering customers from their paper-based roots to a new digital path.

**Old school you say? Perhaps.**

**Your strategy needs to go beyond paperless**
Interestingly though, the volume of processes in organizations involving unstructured content would still shock most. You see, somewhere along the way, anything that wasn’t classified as discrete data got stuck with the term ‘unstructured content.’ Unfortunately, unless you live in IT, that probably doesn’t mean a lot to you, but it really does sit at the root of a comprehensive digital transformation strategy.

People often say to us, what are you going to do when paper goes away? Exactly what we are doing today is my answer. You see, unstructured content is a heck of a lot more than scanned paper documents.

Having trouble storing, let alone finding, your MS Word files? Google Docs? Excel? How about PDFs? Still getting faxes?

Yep, we are still organizing those and allowing people to easily search for and retrieve them. In fact, many of our customers aren’t scanning anything at all.


Ah, I know what you are thinking. To be transformative, we have to improve the speed of business. Help with decision-making. Improve processes. Truth be told, for organizations worldwide, we have been doing just that.

Workflow and case management solutions have been hallmarks of our product for more than a decade. These solutions automate business processes, forwarding accurate and complete documentation through critical processes while notifying stakeholders and exchanging data with core systems (I’ll talk more about that later). With both back office and vertically based process accelerators, we have helped organizations automate and transform processes from invoice processing to medical coding. From student admissions to employee onboarding. Claims processing to electronic plan review? Yep, those too. All while improving standardization and compliance.

Still not transformative enough? Okay, I’ll buy that.

**A holistic view of customer information**
With organizations spending massive amounts of money on core application infrastructure upgrades on everything from ERP to CRM, EMR to SIS, claims systems, banking systems and everything in between, unstructured content and even the associated workflows cannot live in a vacuum. They live as part of an environment and IT ecosystem that today requires a holistic view of a constituency and its transactions.

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Maybe it’s students. Or patients. Or citizens. Or customers. Employees shouldn’t spend their
time looking in multiple systems to see the whole picture. Integration of that unstructured
content and its associated processes with these key line-of-business systems? Okay, now we're
getting somewhere. This is sounding pretty transformative.

In the words of every infomercial, umm, ever,
“But wait, there's more!”

You see, as organizations go through this transformation, the definition of “end user”
changes. A lot. This information that we’re managing? Well, people want to see it. Not just

And like a good protest march, “When do they want it??? NOW!” In the cloud. On their devices.
Securely shared. You can’t just keep that content to yourself any more.

In the cloud or on your premises. That’s how. One platform that offers storage, retrieval, workflow
software, case management software, integration, sharing, securely accessed through the cloud
or on premises. On your desktop, laptop, tablet, phone, anywhere in the world — even offline.

Transformative? More than 19,000 Hyland customers across 80 countries think so. Here
at Hyland, we’ve been digitally transforming customers since 1991.

And we’re ready for you to begin your journey.

Are you ready to transform?
Now that you’ve learned more about the ways in which your organization can digitally transform, it’s time to learn how you stack up among your peers. Download **AIIM’s Information Management: State of the Industry 2017 report** to learn more about the current state of the industry and how different information management strategies support progress toward digital and business transformation.

>>> Download the report
One platform
Unlimited potential

For more information, visit OnBase.com®