

# CHOOSING A CONTENT SERVICES PARTNER

Find a content services partner that will score you a standing ovation from your constituents



Hyland®



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# Let the auditions begin

In a 2020 Forrester study entitled Full Speed Ahead: Content Services Continue To Fuel Digital Transformation, 28 percent of respondents in the government vertical stated that they have already implemented or are expanding their content services implementation, while 60 percent say their organization is making content services a “high” or “top priority.”<sup>1</sup>

It’s clear these organizations have seen the potential for content services to, well, transform their digital transformations — especially when it comes to constituent engagement improvements.

If your agency is considering investing in content services as a way to improve the constituent experience, casting a content services partner is your next big undertaking. But how do you narrow the field?

This ebook will help you define the capabilities most critical to enhancing the citizen experience, both directly and indirectly. But it’s also meant to help you find a talented and well-rounded partner truly committed to working with you to accomplish your goals. It’s the combination of capabilities, expertise and proven success that is the true test of whether a provider has the star quality your organization needs.

Use this guide directly in your evaluations or as a reference to create your own audition criteria for content services partners.

1. A commissioned study conducted by Forrester Consulting on behalf of Hyland.



# Act 1

## Setting the stage with capabilities



# Create more enjoyable performances

Content services is a set of offerings that range from content management to case management. Will all of these capabilities directly affect your constituents' experiences? While it could be argued that every content service offering can contribute to simplifying business processes, and therefore create more opportunities for employees to focus on citizens, there are several capabilities that take center stage.

In Forrester's 2019 thought leadership paper "Content At Your Service", thought leadership paper<sup>1</sup>, Forrester asked study respondents which content services capabilities are most important to them. Their responses pointed to six top capabilities "needed of today's extended enterprises — those which require the delivery of superior experiences and collaboration opportunities between employees and external stakeholders in the normal course of business." Hyland dives into these crowd-pleasing content services capabilities next.

1. A commissioned study conducted by Forrester Consulting on behalf of Hyland.



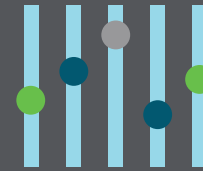




# Dazzle with document sharing and collaboration

The partner you cast should enable your agency to improve both user and constituent experiences. An enterprise-ready, cloud-based tool will allow you to securely share content, collaborate on documents and extend related processes to individuals inside and outside your organization.

## KEY FEATURES:



### CONTROL

Your solution should limit the ability to add user accounts to admins and allow them to set specific sharing rights depending on the user group.



### SHARING

Users should be able to set permissions per share, per document and per recipient and share from anywhere — mobile device, desktop application or web applications. Sharing with external parties should be enabled through links that can be password protected and tracked.



### COLLABORATION

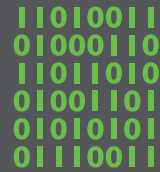
Editing should be available directly from familiar applications (including Word, PowerPoint, Excel, etc.) with chat/commenting alongside every document.



### ACCESS

Simple organization through tags and folders should enable easy search. You should be able to access documents from mobile app, desktop app (also while offline) or web app and have access to all versions right next to the document.

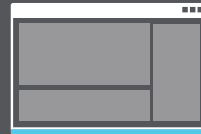


**KEY FEATURES:**

Data utilization from multiple sources to create accurate and up-to-date correspondence



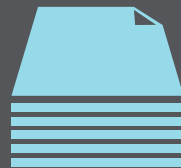
An integrated data designer for easy data modeling



An intuitive interface for business process owners to author and manage document content



On-demand document generation



Automated document generation and batch capability to free up resources



Output design options to provide document packaging, business logic, document transformation, and configuration of distribution channels



## Captivate with customer communications management

A content services partner with a strong focus on customer experience-improving capabilities should allow you to create and distribute personalized correspondence and customized documentation in a variety of formats to all the people you serve in an efficient, cost-effective and consistent way.

The following integration capabilities are vital in reducing the time and effort it takes to create individually personalized content from standardized templates on demand, while fully supporting high-volume composition processes.





# Delight with document management

Strong document management capabilities allow you to organize, manage and optimize content across your agency, including compound documents and rich media files. When users are empowered to find the information they need when they need it, they can provide faster and more accurate responses to constituents.

## KEY FEATURES:



Revisions and versions to track every modification made to documents, with a permanent revision history, ensuring users only access the most current versions of documents



The ability to capture and apply handwritten signatures with a stylus or tablet, using digital certificates to ensure authenticity and integrity or by integrating with DocuSign



Notes and markups to streamline collaboration



Redaction and virtual folders to automatically mask private or confidential information in documents based on business rules

## KEY FEATURES:



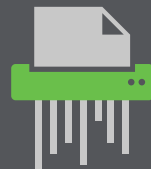
The ability to configure automated rules and workflows for common retention tasks like approvals, transfers to storage, archiving and deletion



Automation of records declaration, retention and holds



Defensible audit trails for the entire lifecycle of your records



The ability to enforce structured retention policies for document destruction



## Rivet them with records management

Citizens are focused on the security of their information, and your chosen partner should be too. Strong partners should provide automated document and records management to securely destroy (and preserve) information according to legal and compliance guidelines, and minimize legal risks enterprise-wide.





# Spellbind with business process management

In today’s fast-paced, digital world, business processes need to be able to keep up. Your chosen content services vendor should allow you to automate tasks, route documents, manage exceptions and extend key processes using advanced tools. Better processes mean faster service and better experiences for constituents.

## KEY FEATURES:



Configurable workflow with built-in rules and actions to automate even complex business processes and streamline the way information and documents flow through your organization



Customizable forms with features like required fields, data validation, calculations with instant results, and the ability to tailor the form’s look and feel



Dynamic approval processes to allow business users to configure rules for document validation and dynamically assign approvers



Process mining to analyze your business processes and make continuous improvements

**KEY FEATURES:**

Document capture to enable the digitization of paper documents with mobile capture, high-volume batch scanning and capture directly from MFDs



Automatic electronic capture of digital documents, such as emails, PDFs and Microsoft Office documents, and the ability to connect them to other key content and processes



Intelligent data capture to automatically extract, classify and validate critical information and seamlessly pass the data to core business applications



## Knock 'em dead with data extraction and capture

This is another capability that can revolutionize your digital transformation and level up your game with constituents. Vendors should allow your organization to leverage multi-channel capture for all types of content. With intelligent automation, you can classify, extract and validate critical incoming information and provide faster, easier access to content to those who need it most.



# Act 2

Why you need a triple-threat partner



# The spotlight is on

In show business, a triple threat is a performer who can expertly act, sing and dance. Facing off against one of these well-rounded competitors in an audition spells certain defeat for other performers.

In the world of content services vendors, it's not much different. According to the 2019 Gartner Magic Quadrant for Content Services Platforms, there are only a small number of vendors who have the star-quality to win a leading role in the industry.

As you evaluate potential content services partners, watch and listen carefully for signs you've found a triple threat.





*“Security of content is essential for all industries and a non-negotiable requirement for regulated industries and those that create and hold sensitive customer information, employee data, intellectual property, or other proprietary information. As interest in cloud rises for content services, customers expect their vendors to have a secure infrastructure and meet rigorous procedures to secure their data centers and the content held within them.”*

*–“Content At Your Service”, a commissioned study conducted by Forrester Consulting on behalf of Hyland, March 2019*

## Security worthy of a standing ovation

A talented actor can learn a script backward and forward and put you at ease as you enjoy the performance. Vendor partners with security expertise are equipped to manage a growing volume of diverse data and systems while simultaneously dealing with sophisticated threats to your security, an increasing number of vulnerabilities that must be tracked and rigorous regulatory oversight. Engaging one of these partners will help optimize the performance of your business and ensure constituent experiences are secure.

### Your partner should offer:

- Assurance that its products go through a security-focused development process
- Data protection while at rest (not actively being used), in transit (as it's being transported between servers) and in use
- Configurable security options, like password policies, granular rights management and security keywords

# Integration that harmonizes systems and makes constituent interactions resonate

Great singers do more than just match a pitch. They bring songs to life by connecting the notes and lyrics on a page with heart. Your core business applications drive critical processes. But when multiple applications are disconnected from each other, data silos result in dissonant systems and processes.

A vendor whose integration capabilities truly sing will enable your employees to access critical content in the right context so they can provide responses that are in tune with citizen needs. From traditional tools like screen-scraping and application add-ins to APIs and tools that fit a more modern architecture like RESTful web services, your vendor's toolbox should include a variety of methods to connect your systems.

## Your partner should enable your agency to create solutions that:

- Provide users with access to complete, up-to-date information directly from the core applications they use every day
- Improve decision-making by elevating content visibility
- Derive more value from existing systems

*"Integration with critical business applications is also a top need, as content is not created in a vacuum but is generated in support of operational as well as customer-facing processes."*

*—"Content At Your Service", a commissioned study conducted by Forrester Consulting on behalf of Hyland, March 2019*



*“Given that 84 percent say tailored solutions — ones built on a foundation of deep customer, process or industry expertise — are important to content management success, it’s not surprising that 84 percent look for vendors that understand the unique content needs of their industry and can support them with industry-specific solutions.”*

*—“Content At Your Service”, a commissioned study conducted by Forrester Consulting on behalf of Hyland, March 2019*

## Industry expertise that’s in step with your business

No one wants to dance with a partner who steps on their toes. The government industry has its own unique choreography of business needs and information management requirements. Choosing a vendor that can match the rhythm of your industry, solve complex challenges and meet the specific, personalized needs of the constituents you serve means you can dance into the future with confidence.

### Your partner should have the experience needed to offer:

- A range of content services to create personalized, seamless solutions for specific industries and regions that are informed by experience-based business insights
- Trusted advisors who understand unique business needs and customer demands, and offer guidance throughout your digital transformation
- Tight, purpose-built integrations developed in close partnership with leading technology vendors
- Robust technology built on strict protocols that empowers your organization to enforce information security and improve regulatory compliance

# CHECKLIST: Evaluating content capabilities



The Hyland platform is designed to complement and enhance core business platforms and applications — not to compete with them. Use the following checklists to help evaluate competing software.

Repository evaluation

Use this guide to launch an initial discovery of the content capabilities of whatever application your team is evaluating. In just 10 questions, you’ll uncover where it stands on essential repository capabilities for long-term use across the enterprise.

		Yes/No	Hyland
FILE FORMATS	Can the repository manage all necessary file formats (e.g., emails, PDFs, images, office documents and rich media files)?		YES
BATCH UPLOADS	Can users scan or upload more than one document at a time into this repository?		YES
MULTI-USER ACCESS	Will everyone needing access, inside and outside the organization, be able to securely view and interact with the content if it is stored in this repository?		YES
RESTRICTED CONTENT	Can access to specific content be restricted by user or role?		YES
GRANULAR PERMISSIONS	Does the system provide granular user permissions for uploading, viewing, editing, downloading, emailing, printing and/or deleting specific documents?		YES
AUDIT TRAIL	Does this content repository provide an audit trail of all content-related user activity?		YES
ENCRYPTION	Does this repository allow for encryption and redaction of sensitive information contained within the content and metadata (e.g. credit card, ID numbers)?		YES
CONTENT WORKFLOWS	Can uploaded content be routed through workflows to identify and amend misfiled documents, incomplete or incorrect information prior to being accessible?		YES
RECORDS MANAGEMENT	Can records management rules be applied to protect the content from early deletion and to destroy according to published retention periods?		YES
SCALABILITY	Has the repository been designed to handle large volumes of content without negatively impacting the performance of the system or size of the database?		YES

If the native repository provided by your core business platform does not include essential capabilities for your long-term information management strategy, it is likely too basic for your needs.

Full content services evaluation

Does the system under evaluation offer the content services you require?

		Yes/No	Hyland
CAPTURE	Multi-channel, intelligent capture allowing content to be captured in any format from any location, device or source with minimal manual data entry.		YES
CONTENT MANAGEMENT	A variety of tools to equip users to digitally interact with content: digital signatures, highlights, annotations, redactions, file-type conversions, revisions and versions.		YES
PROCESS AUTOMATION	The ability to create and change document-centric workflows for your content without relying on code, scripting or the vendor.		YES
CUSTOMER COMMUNICATIONS MANAGEMENT	Automated generation of customer communications with multi-channel distribution — such as email, text and physical mail		YES
COLLABORATION	The ability to securely share documents and collaborate with individuals inside and outside the organization without relying on email, FTP sites or unsanctioned file-sharing tools.		YES
CASE MANAGEMENT	A low-code platform to build applications and solutions to manage data associated with tasks, activities, conversations and reminders relating to your content and processes.		YES
REPORTING AND ANALYTICS	A variety of interactive dashboards displaying the status of content, processes, cases, user activity and overall system health.		YES
SEARCH	The ability to search multiple locations from a single search, utilizing advanced search logic such as wildcards, phrases, Boolean, fuzzy search and natural language processing.		YES
RETENTION AND RECORDS MANAGEMENT	Automated records management and retention to ensure that your content is both preserved and destroyed according to published requirements.		YES
INTEGRATIONS	Pre-built integrations with a variety of systems, office and email applications and repositories, enabling easy content retrieval and upload with an instantaneous exchange of data.		YES
SECURITY	Encryption of data and content at rest, during transmission across a network and while being accessed.		YES
ARCHITECTURE	Scalable, highly performant architecture that will meet the current and future content needs of the organization, on-premises, in a hybrid or pure cloud environment.		YES

# Drumroll, please...

## Ultimately, your top performer should:

- ☒ Consider content to be an essential element of your digital transformation
- ☒ Continuously invest in the modernization of their platform and focusing on capabilities that help government agencies and departments improve constituent experiences
- ☒ Offer cloud content services and have the ability to adapt to public, private or hybrid requirements
- ☒ Provide services that help you build a road map that acknowledges the need for agility and flexibility

If you've checked every box, you may have found the content services partner with the versatility needed to make your digital transformation a winner with your organization's internal and external audiences.



# The role of a lifetime

A headshot and a high school theater resume just won't do for a performer auditioning on Broadway. And a vendor who can't meet the rigorous criteria outlined here isn't going to help you get rave reviews from your most important critics — your customers.

After all, choosing a vendor is about more than purchasing software. It's about entering into a partnership that will have a huge impact on the future performance of your business.

## WANT TO LEARN MORE ABOUT CONTENT SERVICES?

[Access the full 2020 Forrester study >>](#)

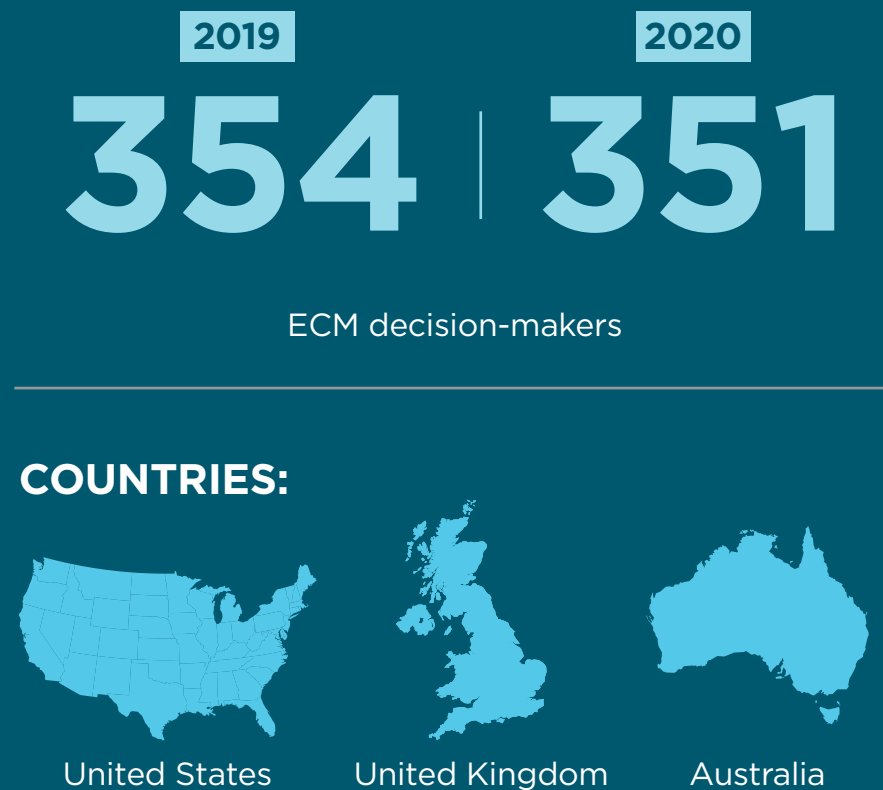
[Access the full 2019 Forrester study >>](#)

[Visit our content services hub >>](#)

# About the cited Forrester studies

Forrester's 2019 study, "Content At Your Services," delivers relevant insights across industries and geographies by using data collected from 354 ECM decision-makers.

Forrester's 2020 study, "Full Speed Ahead: Content Services Continues to Fuel Digital Transformation" delivers relevant insights across industries and geographies by surveying 351 ECM decision makers.



## INDUSTRIES:



Healthcare



Insurance



Financial services



Higher education



Government



Manufacturing



Business/professional services organizations

# About Hyland



# About Hyland

Hyland provides a complete view of the right information to the right people, where and when they need it. Serving as a content services hub, we smartly surface content in context by connecting data and systems across the enterprise. By providing users with easy, secure access to complete information — anytime, anywhere, on any device — we enable organizations to digitally transform and facilitate more responsive, meaningful interactions.

Our deep industry expertise draws on decades of working with organizations around the world to solve complex challenges. Across our business, we leverage this knowledge to help organizations build expertly tailored solutions that fundamentally transform the way they work and meet the specific, personalized needs of the people they serve.

With more than 3,600 employees around the world, Hyland is widely known as both a great company to work for and a great company to do business with.

# Hyland®

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