

BEST PRACTICES:

ACCELERATING MODERNIZATION WITH ENTERPRISE CONTENT SERVICES IN THE CLOUD



Hyland™

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According to industry experts, state and local government agencies have long been moving toward “cloud first” and “cloud smart” strategies. In 2020, when COVID-19 disrupted business as usual, it provided an unexpected opportunity to determine if these initiatives provided the desired return on investment. Government leaders found that they did. To quickly empower a remote workforce when office locations closed due to the pandemic, cloud and software-as-a-service (SaaS) delivery models were key to providing employees access to the information and documents they needed to do their jobs from any location — at home, in the office or in the field.ⁱ

With proven results, government and private-sector technology executives believe the adoption of cloud and SaaS will accelerate going forward. According to a recent Flexera survey, 59 percent of enterprise IT leaders plan to increase cloud adoption either slightly or significantly as a result of COVID-19.

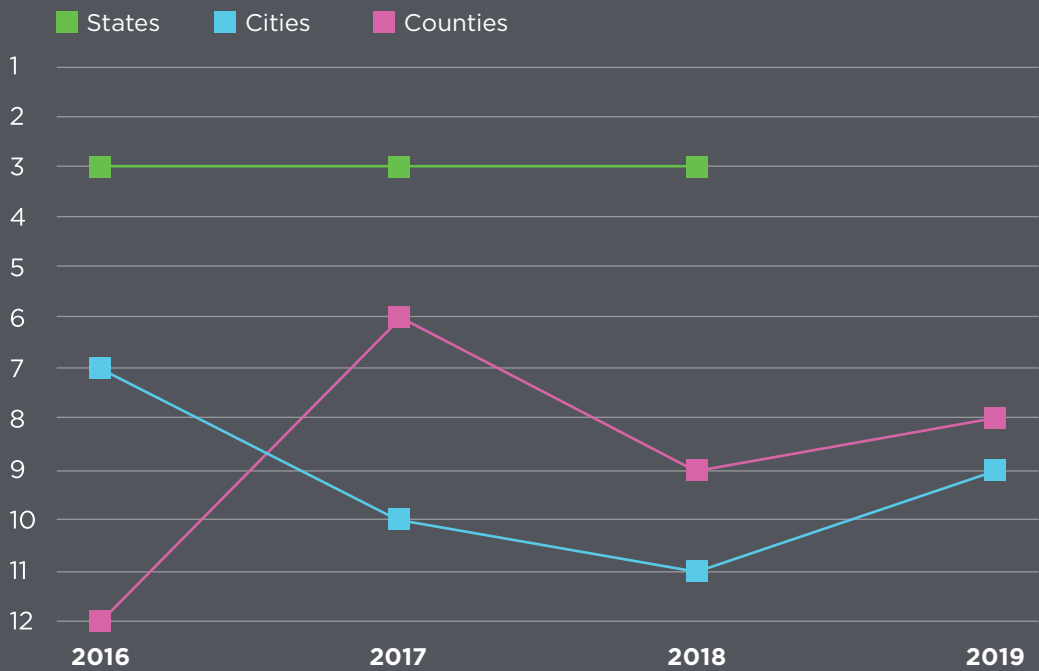
As noted above, government was already headed in this direction. In NASCIO’s 2019 State CIO survey, 34 percent of IT leaders had a cloud migration strategy in place and 51 percent had a strategy in development. According to the Center for Digital Government (CDG), states, cities and counties all now rank cloud in their top ten IT priorities while stating that 50 percent or more of their systems can go to the cloud as shown in the charts on this page.ⁱⁱ

i. GovTech, *2020 Puts Cloud Computing in Government to the Test*, September 2020

ii. Center for Digital Government, *Digital States Survey*, 2019

HOW DOES CLOUD RANK?

Here’s how cities, counties and states ranked cloud technologies among their IT priorities.



WHAT’S IN THE CLOUD NOW, AND WHAT CAN GO TO THE CLOUD?

Cities, counties and states in the Center for Digital Government’s surveys all said that between 11 and 20 percent of their systems were currently in the cloud. But as the data below shows, the numbers get much higher when the question is what percentage can eventually go to the cloud.

	2017	2018	2019
Cities	41 – 50 percent	41 – 50 percent	More than 50 percent
Counties	41 – 50 percent	41 – 50 percent	41 – 50 percent
States*	More than 50 percent		

As organizations consider which systems to migrate the cloud, the market is seeing a dramatic shift to moving content management to the cloud. In a 2018 IDC survey, 55 percent of organizations were already using cloud for their enterprise content applications and another 28 percent had planned to use the cloud within the next 12-18 months.

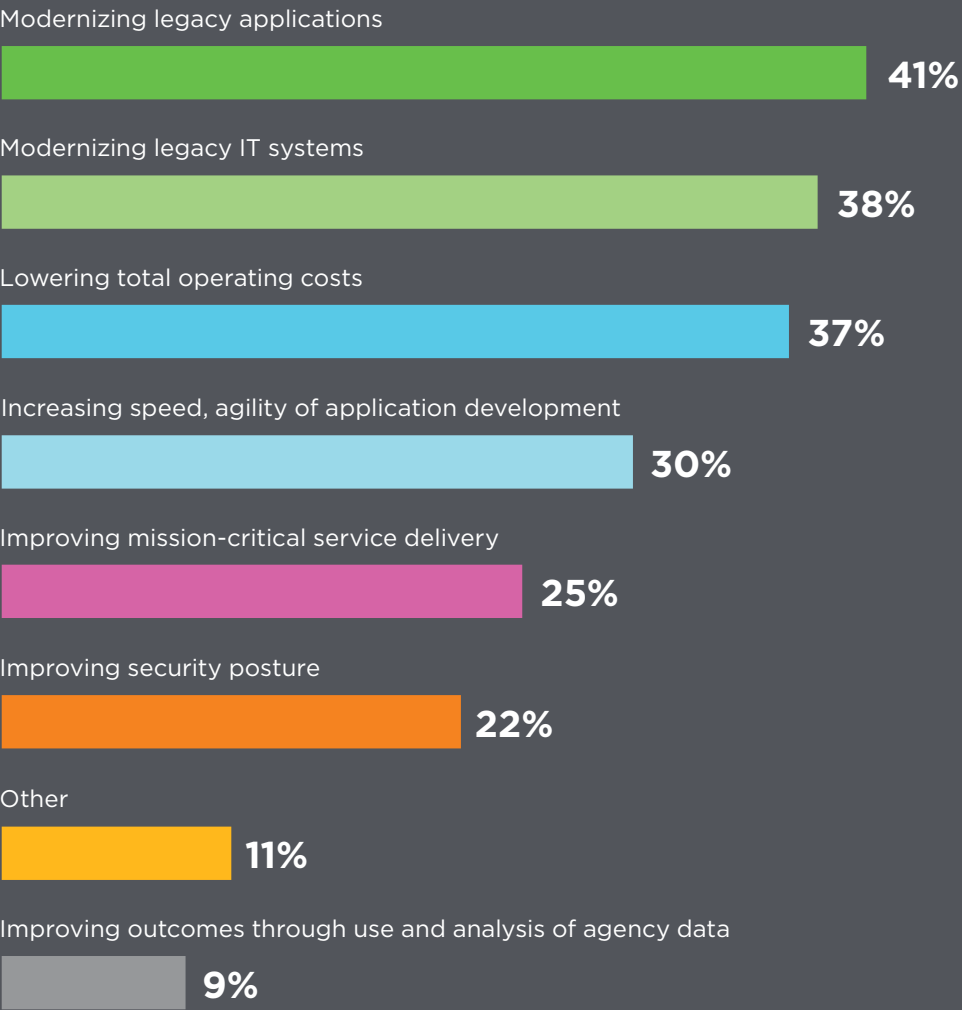
An enterprise approach to managing content in the cloud can help agencies overcome the information challenges of siloed, aging legacy systems to modernize operations and reduce infrastructure costs. In a CDG survey of state and local IT professionalsⁱⁱⁱ, 41 percent stated modernizing legacy applications was the biggest benefit of moving to the cloud while 38 percent cited modernizing legacy IT systems. Other benefits included lowering total operating costs and improving mission-critical service delivery.

Migrating to the cloud with a shared services model enables state and local agencies to centralize siloed IT solutions on a single platform and support a hybrid remote/office workforce that may be here to stay. A modern cloud-based platform provides secure content storage and facilitates collaboration while ensuring ownership and control. Hosting data in the cloud means it is accessible from anywhere in real-time, improving efficiency and transparency.

But moving to the cloud can seem to be a daunting task. Knowing the steps to take can be the key to success, starting with the right partner.

iii. Center for Digital Government, *Gaining Steam: Cloud Platform Adoption and Emerging Technologies*, 2019

IN MOVING TO THE CLOUD, WHAT HAS BEEN THE BIGGEST BENEFIT TO YOUR AGENCY? (SELECT UP TO 3)





With exponentially more content to oversee, enterprise leaders have realized they need something more secure, reliable and scalable than on-premises solutions. Their answer?

Cloud-rooted applications that define content services platforms.

Content and the surrounding processes have increasingly been recognized as a major driver of digital transformation — so much so that Gartner minted the term “content services” in 2017 to recognize the potential of this emerging technology. Three years later, enterprise content services platforms are an integral part of solving longstanding issues and centralizing online organizational content, cases and related data. The result is a streamlined content ecosystem that allows an agency to focus on their mission.

Many offerings, like [Hyland’s content services platform](#) are scalable — empowering government agencies with proof-of-concepts that can be deployed within a department or on a modular basis, or support a full realignment of content- and process-related practices. No matter the scale, these platforms can fulfill your organization’s needs.

In order to achieve the many benefits of enterprise content services platforms, it's critical to select the right partner. They will guide you through the process and can help chart what your agency's content future looks like for years to come. You will need to ask some critical questions of both your organization and potential vendors in the process, and follow some important best practices when considering more technical features like cloud capabilities and disaster recovery.

At Hyland, we see firsthand how important it is to find the right home and trusted hands for your agency content. We've compiled this ebook as a walkthrough of the discovery, vetting and deployment process of a content services engagement. It also includes best practices for measuring success and guidance toward the future state of content services. Additionally, we call out some helpful related guides that can take you deeper into each part of the journey.

THE CHANGING CONVERSATION ABOUT ENTERPRISE CONTENT

The way we talk about content has evolved over the last decade. Thanks to leaps in cloud technology — better security, more transparency, processing power for AI and analytics, elastic scalability — solutions that once seemed impossible now come standard in many offerings. But just as the technology itself has changed, so has the way the industry discusses it.

The strategy behind content management systems is the first noticeable shift. All-encompassing, massive central content repositories that were once the goal of many organizations have given way to more efficient, modern systems enabled by the cloud. Systems that aggregate useful data across multiple content repositories and deliver it when and where employees need it are the future. Organizations that embrace these systems report more efficiency, better productivity and a host of other improvements across operations.

The vocabulary of content management and services has also changed. In the past, the term enterprise content management (ECM) was used to describe the more centralized technology and resource-heavy processes involved in handling massive amounts of organizational data. "Content services platforms," on the other hand, denotes a new generation of agile technology that uses modular and cloud-based applications that work across content repositories and systems. These applications enable users to not only share content, but to improve processes and create efficiencies.



Step one: Assessing

Content, and the processes surrounding its creation, management and execution, are broad concepts. A good place to start in assessing your needs is to identify the content you have on hand. Every agency has “unknown unknowns” within their content and related practices. Perhaps there’s a trove of HR content that lives on an old server, or maybe crossdepartmental teams struggle to collaborate and serve constituents because no one can agree on which format to use. Neither of these scenarios are ideal, but they are perfect examples of the type of unknown you are trying to uncover as you audit your content.

This information gathering and assessment stage of your capabilities will help you triage the problems that need to be solved, and shape the questions you will ask potential partners. Think of this exercise as bringing a fresh set of eyes to each and every piece of content and the practices surrounding it.

	What it is	Where it's found	Who owns it
Case content	Applications, forms, supporting documentation, constituent correspondence and emails	CRM and ERP platforms, homegrown or outdated case management systems, shared drives	CIOs and IT leads, customer service teams
Procedure content	Manuals, workflow documentation, privacy, training and certifications, document retention	Physical locations, shared drives, intranets	COOs, department leads, records managers, project managers
Back-office content	Accounts payable and receivables forms, financials, contracts, grants, GIS	Secure servers, payroll systems, accounting dashboards, ESRI	CFOs, A/R and A/P team leads, accountants, planners and public works
HR content	Personnel files, onboarding and offboarding information, disciplinary actions, benefits guides	Intranets, shared drives, employee handbooks	HR team leads, department heads
Miscellaneous and internal content	Historical documents, land records, reports, archived emails, spreadsheets, and research	Individual drives, old servers, unorganized departmental files	Can be owned by anyone

As you audit this content, be mindful of opportunities to improve and problems to solve. Most likely, the challenges you uncover will align with one of several overarching goals:

- Improving security/disaster recovery
- Improving accessibility
- Finding cost savings
- Supporting a remote workforce
- Streamlining processes
- Increasing data availability/uptime
- Incident response
- Handling geographical disbursement of content

GATHERING STAKEHOLDERS

Once you have identified and ranked the projects you've chosen to pursue, engaging all the appropriate internal stakeholders is an important next step. During this process, you want to identify every employee that will touch the rest of the process, from vetting potential solutions to measuring the end result of the deployment. This will help you align on strategy and avoid situations where leadership is misaligned with the needs of different departments or functions.

SETTING THE SCALE AND STARTING THE SEARCH

Once you know the issues you're working to solve and you have your team gathered and aligned, the next consideration is one of scale. The best content service platforms and applications can handle a range of problems from large to small — it will be up to you to determine how aggressive a strategy to choose. Some considerations when determining scale:

- **Timing:** How quickly do you want to launch, and how fast do you expect to see results. This critical determination will inform the budget and the priority of the project.
- **Budget:** The amount you have to spend will play a major role in determining how large the engagement can be. Thankfully, the modular nature of many platforms helps with this.
- **IT capabilities:** Keep initial projects small, and scale them according to your IT team's skill.
- **Strategic alignment:** Certain projects may make more sense because they align with a similar goal or technology deployment occurring in another internal department. If one department is pursuing a solution that may help you as well, is it possible to align?
- **Priority:** No project needs to be a “lift and shift” of everything to the cloud. Instead, you may have one or two critical needs that can be addressed with a proof of concept or smaller departmental deployment. These projects can help you make big impacts in relatively short time spans — with less disruption.

STAKEHOLDER GROUPS

- **Key stakeholders:** IT, along with department leads and decision-makers with purchasing authority. This core group will be most involved throughout the process.
- **End users:** Diverse groups of everyday users of the current content processes or product. This cohort is often forgotten, but is critically important, as these stakeholders are the day-to-day users of the solution. If your changes don't make things easier for them, what's the point?
- **Administrators:** Any team member or manager that will need to give approvals or access during deployment.
- **Other strategic leaders:** Decision-makers within the company that may also be pursuing digital transformation efforts on their own. This ensures there is no unexpected overlap or redundancies in systems that could cause setbacks or unintended consequences. You can also strategically align certain plans to capitalize on shared technology investments.



Step two: Vetting

Identifying an opportunity for improvement is an important first step, but vetting the right content services solution or provider can make or break the results. Because the vetting process often includes making critical decisions on cloud migration, it's important to ask the right questions.

	Security	Accountability	Technology	Service
Questions to ask	<ul style="list-style-type: none"> — What type of testing is done on the cloud network? — How is security handled? — Where are the regions data is stored and are there alternatives? — Who has access to data? — What protocols are in place around personal information? 	<ul style="list-style-type: none"> — How quickly are issues resolved? — How much on-site maintenance is required? — Will we have access to senior leadership if necessary? — What are your procedures if a breach occurs in the cloud? 	<ul style="list-style-type: none"> — How often are updates pushed into production? — What kind of downtime can be expected? — How do product teams keep pace with new technology? — How familiar are you with our current technology environment? 	<ul style="list-style-type: none"> — Are there self-service options? — Is there customer service in other countries/languages? — How do we engage on future projects? — How often will updates need to be made to the system?
What to listen for	<ul style="list-style-type: none"> — Expertise in compliance with HIPAA, SOC and NIST regulations — Audit results of third-party security and penetration testing — Established relationships and expertise with multiple cloud providers 	<ul style="list-style-type: none"> — A detailed escalation and crisis management plan — Clearly defined roles that manage and work with your account — Vouching for all third-party technology partners 	<ul style="list-style-type: none"> — Longtime partnerships with major cloud providers — Data to back up system uptime claims — Resources and dedicated team members focused on the future state of the product, including product development and staying ahead of new technology 	<ul style="list-style-type: none"> — Dedicated support for each country/continent — A suggested cadence for reevaluating the engagement — An always-on portal to add/modify service

After you've asked these questions and completed your fact finding, narrow your prospects. In addition to the considerations above, also heavily weight your finalists' time-in-market and do some digging on the business stability of the prospects. Your conversations at this point should be with companies that can provide case studies and metrics to prove their reputation within the industry. Vendors in the later stages of the decision-making process should also be able to help you with the following:

- **Defining success criteria:** Ask the final prospects which KPIs they believe will measure success, and how they would help establish them. These will depend on your goals. If improving HR content practices, for example, a KPI may be a better ratio of qualified candidates to overall applications, or better response time to candidates because recruiters have more time to reach out.

- **Determining security needs and establishing accountability:** This is the opportunity to ask tough, direct questions about accountability and the partner relationship. It's also a time when you can discuss more sensitive or proprietary content and how it would be secured.
- **Establishing an opportunity cost and quantifying savings:** Have the prospects provide a detailed breakdown of costs and services. Use this to establish your ROI goals and plan for future transformation.
- **Providing a timeline for success:** Prospects should provide a clear, detailed roadmap of how long implementation will take post-purchase. This timeline should also include how soon results and ROI can be achieved.



Step three: Implementing

A content services partner can guide you toward the right cloud architecture option to power your solution — whether it's a small proof of concept (POC) or a full overhaul of your content systems.

But once a strategic partner is chosen, your work is not complete. An excellent partner can help make the process of transitioning to a new system as seamless as possible; however, there are still important parts of the process that require attention from a variety of stakeholders.

- 1. Preparing for implementation:** Your strategic partner can help make the process as seamless as possible, but you should expect a fair amount of preparation for an engagement. For a more detailed breakdown of what's involved in the logistics and planning process of a handoff and deployment, [use our onboarding and implementation process as a guide](#).
- 2. Establishing KPIs and gathering historic metrics:** Once you've determined what KPIs will measure the success of an engagement, you will need to ask stakeholders to gather historic data in order to establish a baseline.
- 3. Conducting user-acceptance testing (UAT):** When your new solution is close to its debut, it's time for the real test of putting it in front of everyday users. UAT can uncover critical issues, errors and process lapses that can make-or-break a deployment. Do not skip this step.
- 4. Creating an “exit strategy” and offboarding old systems:** Old equipment and processes don't just disappear. Engage with end users and department leads to talk about a transition to new systems and deadlines for when old systems are sunset.
- 5. Determining threshold for iteration and changes to implementation:** Lean heavily on your partner for this step, which establishes specific criteria for what to do when a solution doesn't work as expected.



Step four: Measuring

No matter how large or small the implementation, the most important output is whether or not the new solution is doing its job. With KPIs determined, it's important to follow best practices for measuring success.

- **Measuring established KPIs:** Immediately following implementation, gather departmental stakeholders that have ownership over the relevant data being used to measure success. Determine a regular reporting cadence, how the data will be shared, and how irregularities and inconsistencies will be addressed.
- **Evaluate impact on the business as a whole:** As you measure specific KPIs, it's also important to consider how these changes are impacting operations as a whole. Are other departments confused about where certain content has moved? Are they slower at a certain task now? Consider a formal, anonymous survey to gather more objective feedback, and regularly talk to stakeholders on an informal basis to get an idea of the larger impact.
- **Look for soft benefits:** It isn't uncommon for organizations to discover additional opportunities and hidden benefits while measuring the originally intended impact. In some cases, end users discover new tools within the platform that help them do their specific jobs better, or a department might suggest a better way to configure a workflow that further refines the system. The most important takeaway here: Listen and adjust as you go.
- **Engage with external stakeholders and peers:** Take your results to trusted industry peers or internal stakeholders who were not originally involved. Ask them to share their reactions, or how they feel like the new system is impacting them. This can provide valuable insights into how the new workflow and technology is being received.

Step five: Iterating in the future

After a successful implementation, you may choose to expand the strategy or scale it to other locations or teams. As you do, keep the future state of your content in mind and make sure your partner has a long-term vision for their solutions.

WHAT THE FUTURE HOLDS FOR CONTENT SERVICES

Digital transformation is a journey, not a destination. A successful implementation addresses today’s needs and also provides a foundation to continue to improve technology and your agency into the future. These are the tools you need to be familiar with as you iterate and consider or build new solutions with your content services platforms.

	What it is	What it will deliver	Time to implementation
Artificial intelligence (AI) and machine learning (ML)	Cloud-based AI and ML capabilities can automate and augment manual tasks so employees can focus on higher-value tasks.	Intelligent data capture, content workflow automation, auto-fill forms, smart list building	Medium-term
IoT	Everyday devices like clocks, refrigerators and thermostats are becoming intelligent — and part of our content ecosystems.	Insights into customer behavior, more nuanced view of customer, increased customer touchpoints	Medium-term
Blockchain	Blockchain creates a chain of ownership and uneditable history of documents and content.	Cross-institutional workflows, greater accountability, less risk of fraud	Long-term
Low-code apps	Low-code applications allow both IT and non-IT teammates to experiment with AI, ML and other powerful tools without learning to code.	Faster implementation of content processes, time saved for IT staff	Short-term

HOW LOW-CODE TOOLS CAN KEEP MOMENTUM STRONG

Low-code is a term that describes applications that are easy to customize and implement by IT or even line-of-business employees, often with little to no code required. With visual development tools like drop-down menus, radio buttons and other familiar interfaces, solutions can be rapidly created to meet specific business needs, sometimes even by the people who will be using them every day. Powerful tools like these can help scale content services with less resources and time to develop and deploy.



Next steps: Content services' constant evolution

Today's most advanced content services platforms offer your agency the ability to dynamically connect content and streamline workflows, but these systems also help your smartest people focus on building the differentiators that set you apart.

Remember that there is much to consider as you imagine the future of your content. The work of assessing your current processes and technology, and determining your desired future state, starts with you. This important work will influence who you engage with during vetting, the stakeholders you bring to the table when implementing and the processes you use to measure and plan for the future.

As you consider what your future looks like, remember you're placing much of it in the hands of your cloud partners. Applications like machine learning and blockchain may seem far off now, but taking that casual approach to innovation caused many organizations to fall behind on digital transformation and technology changes in the past.

The best decision you can make now is partnering with a provider that has a long track record of content and process management success but also an eye to the future with application of advanced technologies — and one that will keep you informed of how they can transform your business.



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. By harnessing innovative and intelligent automation technologies that anticipate the needs of users and customers, we help organizations and their employees focus on high-value tasks to develop more meaningful, relevant connections with the people they serve.

Hyland™

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