

# ASSESS WHERE YOU ARE, GET TO WHERE YOU NEED TO BE

How to transform capabilities for your people and processes with technology



Hyland®



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# Introduction

Many organizations want to take the next steps toward transformation, but may not know which path is the right one to best capitalize on their technology infrastructure, organizational goals, customer expectations and evolving requirements, including regulatory mandates and service level agreements (SLAs).

Digital transformation requires a true understanding of how an enterprise currently interacts with the information and technology in its environment. This understanding illuminates what is possible with technology, business process optimization and elevated user experiences.

## A critical component often overlooked in transformation efforts

People are the drivers of digital transformation, and the people who use your solutions are a key component to whether or not innovation efforts drive disruptive transformation, add complexity without benefit, or fail altogether.

Understanding this up front, and keeping people at the heart of the process enables you to guide your teams and technology to transformation victories. Your organization's transformational success is dependent on understanding how technology innovation will impact the day-to-day lives of people — both your users and the people they serve.

Sometimes, it is small adjustments that can yield tremendous benefits and significant victories toward digital transformation.

This ebook provides simple methods to ensure success along your journey.

A large graphic showing the number 87 in a purple-to-blue gradient, followed by a blue percentage sign.

**OF CURRENT ECM  
DEPLOYMENTS WILL  
EXPAND IN 2018**

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

It is important to remember that “digital transformation” involves more than just technology. The people and process elements are also vital to successful digital transformation.

AIIM ebook  
State of Information Management: Are Businesses Digitally Transforming or Stuck in Neutral?

## RESPONDENTS FAVOR VENDORS WITH SECURITY, INTEGRATION, AND INDUSTRY EXPERTISE

**84%** say tailored solutions — ones built on a foundation of deep customer, process, or industry expertise — are important to content management success

**84%** look for vendors that understand the unique content needs of their industry and can support them with industry-specific solutions

Content At Your Service  
How Modern Content Services Platforms Power Digital Transformation  
A commissioned study conducted by Forrester Consulting  
March, 2019

## ECM DEPLOYMENTS CONTINUE TO GROW, BUT CHALLENGES PERSIST

Employees clamor for better knowledge sharing and discovery, yet user adoption of ECM tools remains a stumbling block. Compounding the challenge is the need to grow revenue and improve customer experience — without neglecting core issues such as digitizing processes and meeting regulatory compliance obligations.

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



# The people

## The user experience is everything

Transformative technology has advanced to be at the fingertips of those we serve. They are reaching for, relying upon and even wearing technology that provides instant access to information or services.

Organizations today face the challenge of elevating their information management strategies and content services solutions to meet the expectations of the digital age. Top drivers for digital transformation include improving the user experience with solutions that rise to meet today's requirements.

*Key areas include:*

- **Providing personalized, often case-based interfaces**
- **Providing mobile integrated solutions that allow for approvals and access to information anywhere, at any time**
- **Extending collaborative workflows to customers, partners, auditors and vendors**
- **Ensuring security, privacy, compliance and controlled costs**
- **Routinely assessing the processes that users depend on, and understanding the capabilities for extending the value of existing technology. This will become increasingly paramount with today's pace of digital advancement**

However, knowing what industry-leading, transformative solutions to implement is just the beginning. A successful solution is one that users adopt enthusiastically; therefore, change management must accompany the design, implementation and rollout plans of content services solutions going forward.

## MAIN BUSINESS DRIVERS FOR IMPROVING CONTENT MANAGEMENT STRATEGY

51 %

said it's to **reduce the number of information silos**

45 %

said it's to improve their **customer service** and **front-office interactions**

AIIM,  
Embracing content services: setting the vision for your organization

## BIGGEST IMPACT OF STRATEGY TO MANAGE PHYSICAL RECORDS AND BUSINESS INFORMATION

69 %

said **process efficiency** and **customer service**

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

## Resistance to change is one of the biggest obstacles to user adoption

The impact change has on people is often an afterthought in technology initiatives when it should be at the forefront of any transformation effort. Regardless of how appealing the benefits of new technology and optimized business processes may appear to the decision makers, there is no guarantee that everyone else will understand the value or even agree.

It can't be understated that alignment among all levels — from those in customer-facing roles, to back end offices, to those designing solutions and analytic strategies — is critical to the success of a technology project. Likewise, your change management strategy, and who will be leading it, is equally important.

## Effective change management leads strategic content services solution delivery

Change management is a structured methodology to promote user engagement and rapid adoption. It is a controlled process that works in tandem with project management when launching new technology initiatives. It enables organizations to uncover obstacles to user engagement, and proactively ensure that the value of the new technology is understood among both internal and external stakeholders.

Those tasked with change management must understand the overarching vision of the initiative, and communicate the reasoning, value and what to expect in ways that relate to each group impacted by the change.

*Effective change management addresses four key areas, providing practical tools for awareness, input and education along the project journey, including:*

- **Alignment** - top down buy-in, visibility management, and organizational motivation
- **Risk and management** - identifying and measuring risks, impact analysis, mitigation strategy
- **Communications planning** - compelling communications to engage, empower and build awareness
- **Customized training and facilitation** - tailored tools, training and supporting materials



Executives are often responsible for change management efforts, but when it comes to digital transformation, effective change management can be challenging to conduct internally in the time-frames required for rollout.

It is often helpful to engage a change management expert to guide or take an active part in this effort.



Changes in organizations are undertaken to improve performance... however, much of the benefit and expected improvement is tied to people changing how they do their jobs ... that number is commonly in the 80% to 100% range.

**Why Change Management**

*Prosci.com*



# The processes

## It begins with assessing where you are

Probably the most intimidating part of any transformation journey is charting the course to reach the defined destination. This is the point in which the people, processes and technology of business initiatives are aligned with enterprise objectives and executive goals.

## To understand how to get where you need to be, you need to know where you are

What tends to be the real challenge for most organizations is taking a step back to look at the entire enterprise landscape and understanding how to dissect the journey into achievable steps in order to reach transformation goals. It's especially difficult to set expectations and pace for reaching these steps without setting up a dedicated team to conduct an evaluation of current business processes, technology and goals.

Historically it is challenging to conduct such an exercise from within. Sometimes you need an outside view into the organization to truly extrapolate a holistic view — an understanding of where you are so you can see how to get to where you need to be.

## Tactical exercises and tools create a roadmap for success

Strategic assessments help IT teams move executive vision forward, while getting the most out of existing information management solutions. This type of exercise provides visibility into the types and sources of enterprise content, assets, technology, people and procedures; and how this impacts short and long-term enterprise goals.

*An information assessment should yield at its conclusion:*

- **Executive-level report with analysis of enterprise impact, risks and considerations**
- **Actionable multi-year roadmap with program milestones, budget and duration estimates**
- **Customized best practices to scale solutions across the enterprise**



Those that have yet to embrace content services cannot risk staying idle as early adopters intend to allocate significant resources to developing their content services capabilities further over the next few years.

To compete, all organizations must shore up skill and technology gaps.

Partners — particularly ones with security, integration, and industry expertise — can help.

Content At Your Service  
How Modern Content Services Platforms  
Power Digital Transformation  
A commissioned study conducted by  
Forrester Consulting  
March, 2019

## Realizing your vision

Excerpt from the AIIM ebook, **Embracing Content Services: Setting the vision for your organization**

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.

**Recommendations:** Take inventory of the content management systems and tools you have in place. Set a goal to synchronize these systems or, at a minimum, provide some level of interoperability that allows the user community to access information across repositories.

Assess how your core capabilities match up against the top five functional requirements, identify your strengths and weaknesses, then work to improve in those areas.

### Top five functional requirements

1. **A unified view of information via components (content services, features, and functions), connecting content with data in their line-of-business systems**
2. **Connectivity and integration to our other business systems**
3. **Advanced integration of systems and content**
4. **Privacy and data security protections**
5. **Strong search and analytics with connectors to other systems**



# The technology

## Ensuring solutions can deliver what's needed, now and into the future

Your opportunities to truly transform the way your business can serve its customers and capitalize on opportunities are nearly limitless with today's content and information management capabilities.

But it's also true that with so many options, it can be overwhelming to determine what technology will deliver the solution you need now and in the future. It is essential that your solutions have the capacity to deliver information when and how it is needed.

They also must have the capability to evolve and expand as your business dictates.

## Optimal infrastructure is crucial to digital transformation

Prior to beginning a technology initiative, it is wise to analyze your business units' technical operations, and evaluate resource utilization to get an idea of your current technological landscape. This exercise is also valuable going forward as your solutions mature and expand, as it provides insights for your scaling needs, including future resource limitations.

It is worth the effort to have expert guidance to help with this analysis as it can help you to remain proactive, scaling ahead of growth.

*Valuable insights to a performance assessment include:*

- **Recommendations specific to resource consumption and scaling solutions up, out or in**
- **New database workload estimation**
- **Architecture considerations to address hybrid or geographically dispersed solutions**

Many organizations take this exercise a step further by looking into high availability requirements and disaster recovery plans.

Optimal infrastructure and performance readiness prepares you to be able to capitalize on opportunities that often arise unexpectedly. This is a significant differentiator in today's fast moving technology-empowered world.



Routine, planned exercises into performance and infrastructure readiness prepare you for surges in usage, daily transactions or volumes at certain times of the year. They also prepare you for success in uptime, recovery point and recovery time goals should an unforeseen catastrophe occur.

Sound high availability and disaster recovery plans include business continuance and reduced recovery time strategies and virtualization/replication plans.

### **Simplify the assessment effort for your teams**

IT organizations are increasingly realizing there is a growing value in conducting comprehensive studies of enterprise-wide processes, departments or solutions, and the technologies that align with organizational vision.

Understandably, these types of assessments can be challenging to conduct solely from within, which is why it is a good idea to leverage an expert in information management and content services solution delivery to lead information assessment exercises.

## **QUESTIONS TO CONSIDER**

Ask yourself these questions to see the value of an assessment exercise:

- **Do you need help to demonstrate the value of digital transformation using content services?**
- **Do you need help evolving your digital transformation strategy?**
- **Are you facing limited resources, awareness and support at the enterprise level?**
- **Are you facing conflicting/competing project priorities?**
- **Have you adopted solutions that don't successfully address business needs? Or are not aligned with organizational strategy?**
- **Do you have an appropriate long-term plan for transformation initiatives?**
- **Would you find value in measuring success, including quantifiable ROI of your information management solutions?**



We were looking for a solution that could scale with our volumes because we started out small but we were growing pretty rapidly. We needed [to] scale very quickly and still be cost effective for our environment ... that's where we rated Hyland pretty high.

**IT Director perspective, on Performance Assessments**

# Conclusion

## Hyland Assessment Services

Your technology should form to the way your people and processes need to operate; not the other way around.

Whether your transformation goals are a complete revamp of organizational processes or bringing a department up to speed, having expert resources support your preparation, planning and execution means that you're not alone.

An Information Assessment, Performance Assessment or Technical Assessment provides a unique opportunity to have trained experts analyze the people, process and technology aspects of your information management capabilities, providing an outside-in perspective of where your enterprise is now, and where it can be in the future.

Smaller scope assessments like Health Checks or Strategic Workshops offer assessment value in low-cost, smaller defined project areas of organizational business process improvement.

Global Services' assessment consultants are well versed in technology even outside of the Hyland product suite. We leverage experiences with other organizations to provide validated insights to help keep initiatives on track, so you reach your goals.

Learn more about Hyland's assessment services by reaching out to your Account Manager or visiting [Hyland.com/Services](https://www.hyland.com/Services).



# 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 experts

# 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 your 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, Gartner named Hyland a Leader based on our completeness of vision and ability to execute.

[Click to get the report](#)

# Hyland<sup>®</sup>

Learn more at [Hyland.com/Services](https://www.hyland.com/services)