

# AGILITY, SECURITY AND COMPETITIVE EDGE

True digital transformation goes hand-in-hand with routine upgrades



Hyland®



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# Introduction

## WHAT IS ONE OF THE BEST WAYS TO LEAD THE COMPETITION AND REDUCE RISK?

Keep your Hyland solutions current.

In this rapidly evolving digital landscape, the people we serve increasingly rely on technology that provides instant access to information or services, from all types of mobile devices, 24/7.

The level of service that transformative technology offers to consumers — including speed of issue resolution, secure access to data and superlative business process optimization — is not only competitive, it is expected. It's the new normal.

## LEVERAGE THE TECHNOLOGY YOU ALREADY HAVE IN PLACE

As owners of Hyland solutions, you have a tremendous advantage with the technology you already have in place.

Capitalizing on your Hyland investment starts with regular solution upgrades and identifying quick-win opportunities based upon business goals and cutting-edge capabilities. Market leaders are doing this today; but the organizations that lag behind may not be able to compete.

This ebook can help get you where you need to be, regardless of the evolving challenges you face in an upgrade project.

# Secure strategy for your business

## WHY KEEPING TECH PLATFORMS CURRENT IS BUSINESS-CRITICAL

No matter what kind of business you run, keeping your enterprise information systems current is a must.

Your organization's information is your most valuable asset, so when it comes to your enterprise information platform, security should be the number one priority.

Threat profiles are evolving with the same speed as other technology. What was secure six months ago may be exploitable today. Keeping software updated to the latest version is one of the easiest ways to remain secure and compliant, and the regular practice of upgrading is a business-critical strategy.

Organizations need the most current security capabilities as part of routine maintenance as they continue evolving at the pace the market demands.

The security inherent in a best-in-class content services platform promotes seamless integrated delivery of documents and data to any enterprise system that would benefit from seeing the complete view of a transaction, encounter or case.



The most compelling business reason to stay current? **Data security.**

The average cost of a single data breach in the U.S. is **\$7.91 million.**<sup>i</sup>

According to 2017 statistics, there are **over 130 large-scale, targeted breaches** in the U.S. per year, and that number is growing by 27 percent per year.<sup>ii</sup>

Thirty-one percent of organizations have **experienced cyber attacks** on operational technology infrastructure.<sup>iii</sup>

## INHERENT SECURITY AND METADATA STRATEGIES SUPPORT COMPLIANCE INITIATIVES AND PROMOTE BETTER SERVICE

Inherent security, combined with metadata — or indexing — strategies that enforce extensible layers of security support compliance initiatives while promoting better service.

These capabilities also help automate governance, records management and document retention, unburying staff from overwhelming and critical administrative paperwork. This enables your team to focus on core business areas, supporting better and faster decision-making, improved service and employee satisfaction.

### Six critical advantages of up-to-date software

Staying current provides the ability to:

1. Ensure your Hyland solution is compatible with the latest technology innovations the world has to offer, whether it's a new operating system, browser, database version or desktop platform.
2. Take advantage of the most optimized features and new functions — including enterprise search across all repositories, leading case management solutions and increasing artificial intelligence (AI) capabilities.
3. Replace outdated APIs with best-in-class versions, in addition to point-and-click configurability to replace the need for coding.
4. Enable compliance and secure delivery of mobile solutions.
5. Bridge integration gaps between existing and emerging systems, and ensure strategies are tied to organizational goals.
6. Support rapid application development to securely respond to evolving business needs.



Forrester forecasts that enterprise content management (ECM) will be a global market **worth \$10 billion in 2019, rising to \$11 billion in 2020**. Buyers of ECM content platforms should look for vendors that:

- Enable information worker productivity with collaborative content services.
- Deliver high-volume automations with transactional content services.
- Provide repository, integration, and federation services.
- Extract insights and automate categorization with intelligent content services.<sup>iv</sup>



# EXCERPT FROM THE HYLAND BLOG

## LATEST ENHANCEMENTS IN CONTENT SERVICES MEET THE NEEDS OF TODAY'S USERS: ENTERPRISE SEARCH

For modern organizations, supporting a *digital transformation initiative* usually means having to process and store more information while investing in more applications.

In fact, software spending is projected to grow by 9 percent in 2019, pushing IT budgets to \$1.8 trillion in the U.S. alone, according to Forrester's 2019 Tech Budget Outlook. <sup>v</sup>

Such significant investment in new business technology brings exciting new opportunities to organizations, improving the customer experience and enabling growth. However, as they add new applications to their arsenals, organizations often inadvertently impact user productivity. With more tools and systems at their disposal, users now may need to consult information from multiple sources to complete their tasks.

Not only do they need to know exactly what to look for, they must also know where to look for it.

The fact that business-critical information no longer lives in a single system is just part of today's reality, and it is not going to change anytime soon. Therefore, the next best thing to searching in a single place is searching from a single place.

This is where *enterprise search* comes in handy. It empowers users with the ability to find information across all enterprise systems and repositories from a single, intuitive search interface and provide smart features that make it easy to find the right information. These features include:

- Query-building tools that help you search by phrases, patterns, synonyms and even misspelled terms
- Refiners that make it easy to narrow the results by topics, sources, dates and other contextually relevant options
- Subscriptions to queries that notify you when new documents matching your search are available
- The ability to search files in multiple languages
- Real-time renderings of files, regardless of file format

The right enterprise search tool will enhance many business processes across your organization, saving time and empowering users with information.



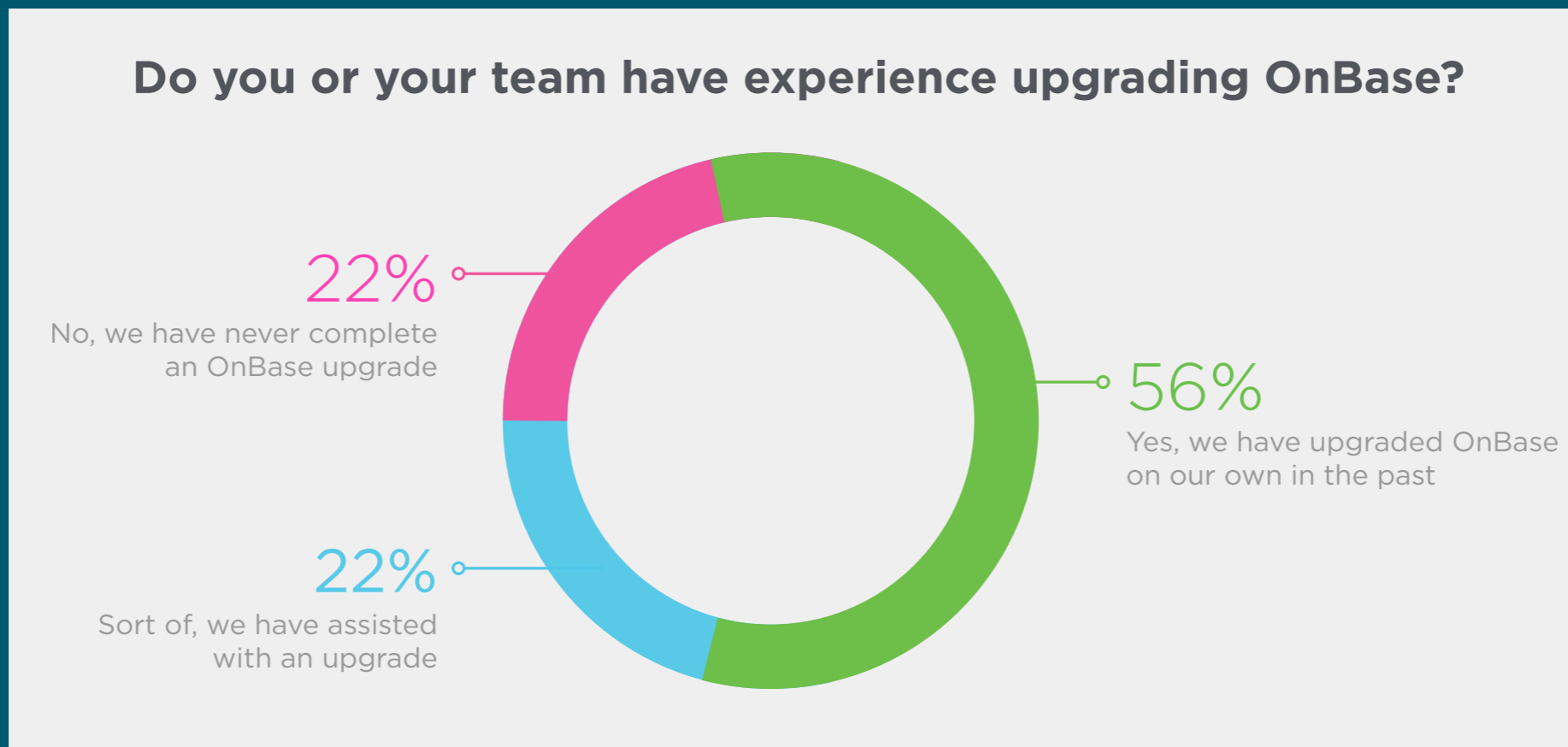
Even managers are wanting to know what the schedule is for the next upgrade. That's how proactive people are here and how engaged they are with our Hyland solutions. They want to see the improvements that come out with new versions of the software just as much as I do.

Integrated Records Manager at one of the top Housing Finance Agencies in the U.S.

## IN ORDER TO CONTINUE TO EVOLVE AT THE PACE THE MARKET DEMANDS, HAVING THE RIGHT PLATFORM ISN'T ENOUGH

It is critical that organizations keep up with the development of leading-edge content services platforms by both implementing regular upgrades and regularly evaluating the solution sets against what consumers are demanding and the goals of the organization, both long- and short-term.

Many organizations engage upgrade services for help with their first few upgrades. This is to learn best practices by working alongside experts and to develop competence and confidence in their capabilities to conduct upgrades without requiring services' assistance.



*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*



# The right next steps for you

## WHILE EVERY HYLAND SOLUTION IS UNIQUE, YOU'RE NOT ALONE WHEN IT COMES TO UPGRADES

You may already know that upgrading your Hyland solution is a highly effective way to optimize your ability to improve business processes across your organization.

Of course, embarking on an upgrade might be easier said than done — especially when some or all of your Hyland solutions are on-premises as compared with upgrading in the Hyland Cloud.

Implementing regular upgrades is a great practice, but a successful one can take a lot of effort — setting up system and end-user testing, checking compatibility with third-party applications, and knowing what resources to tap on your own team.

Successful upgrade plans for on-premises solutions also require an understanding of your technology infrastructure footprint, such as knowing what server needs to be accessed to address each component, or whether it's better to upgrade with a synchronous or an incremental parallel upgrade process (IPUP) method.

There are several different paths for upgrading—each with pros and cons—and dependent on the knowledge and resources at your disposal.

Some customers have the resources to upgrade in-house; others might need to engage a dedicated consultant from Hyland Global Services to handle the entire project. Regardless of whether your Hyland solutions are on-premises or in the Hyland Cloud, there are resources at your fingertips to significantly simplify this critical exercise.

Of course, embarking on an upgrade might be easier said than done — especially when some or all of your Hyland solutions are on-premises as compared with upgrading in the Hyland Cloud.





Before engaging Upgrade Services, we spent days walking around to every PC individually upgrading our solutions. Now, Hyland plans and performs the production upgrade, testing and post-upgrade support. And we've got our upgrade deployment schedules down to three hours; that right there is a return on investment.

Integrated Records Manager at one of the top Housing Finance Agencies in the U.S.

## WHAT PATH IS RIGHT FOR YOUR UPGRADE?

Here's a breakdown of two different ways you can upgrade your Hyland solutions. Take a look and see which one might be most appropriate for your upgrade.

### The DIY approach

Upgrading without additional resources from Hyland is the right choice when you're comfortable with your Hyland solutions and have a strong capability in these areas:

- **Experience:** You've successfully upgraded before and know the different scenarios and how to handle any potential obstacles that might arise.
- **Support:** You're surrounded by seasoned professionals to support your upgrade. If you run into challenges, you can trust the team to help figure everything out and move forward successfully.
- **Knowledge:** You've done extensive research and planning and have a thorough understanding of all the necessary components, including how your Hyland solutions are integrated with the systems your organization relies on every day. That also means you've worked through important concepts in a test environment and completed user acceptance testing for the most critical processes.

If you are on a DIY journey, you can find additional resources for your upgrade — think manuals, checklists and active forums — on the [upgrade page on Community](#).

### Upgrade with the help of Hyland Global Services

Even with in-house capabilities, timing or resource availability can stall upgrades. Here are a few ways we can help — with additional details on these services in this eBook:

- **Staff Augmentation services:** When you need temporary support for your team during an upgrade to ensure you have sufficient resources for any niche areas outside of your team's expertise. Our expert acts as an official team member (you retain full control over tasks and hours) to hit the ground running, help with planning and meeting deadlines.
- **On-Demand services:** When you have most of the resources you need in-house, but need access to a team of experts to answer questions outside the scope of technical support. They can also help with planning and organization prior to an upgrade.
- **Upgrade consulting:** Even highly experienced system administrators may find this option useful to ensure the best upgrade experience. Consulting begins with an in-depth assessment to identify best methods for the upgrade and can range in scope from discrete areas of an upgrade to end-to-end upgrade project delivery for an enterprise solution.
- **Hyland Cloud solutions:** All you have to do is ask for our experts to upgrade your solutions to the current version. Upgrades are included as part of this managed service; however, you are the experts in the business processes that your Hyland solutions support. The cadence and upgrade strategy is managed by you.

## IT MANAGEMENT CONCERNS — 2018 SIM IT TRENDS STUDY

The 2018 SIM IT Trends Study is one of the most comprehensive investigations of IT leaders and practices within organizations in the United States. The 769 organizations participating in this year's study represent nineteen point three percent of the \$18.56 trillion GDP of the U.S.

The study identified organizations' eight most important IT management issues from 2007 to 2017 as:

1. Security/Cybersecurity/Privacy
2. Alignment of IT and/with the Business
3. Data Analytics/Data Management
4. Compliance and Regulations (e.g., HIPAA, SarBox, SAS70, PCI, etc.)
5. Cost Reduction/Cost Controls (IT)
6. Cost Reduction/Cost Controls (Business)
7. Innovation
8. Digital Transformation

*“To modernize, some organizations have turned to content services: granular capabilities and APIs, often delivered in a flexible software platform, that allow developers and designers to create document- or process-rich content applications.”<sup>vi</sup>*

# Hyland Managed Services strategically extend your teams

**DO ANY OF THESE STATEMENTS HIT CLOSE TO HOME WHEN YOU THINK ABOUT UPGRADING YOUR HYLAND SOLUTIONS?**

1. We have the knowledge, but not the time to implement an upgrade.
2. We have a laundry list of projects we want to do in addition to an upgrade.
3. We don't have enough staff to handle an upgrade on top of everything else we have to do.
4. It's been a long time since we've upgraded. There is concern about how this will increase complexity to the upgrade process.

If so, then one of Hyland's managed or consulting services may be the right upgrade path for your organization.



## STAFF AUGMENTATION: AN EXPERT IN YOUR INDUSTRY-SPECIFIC SOLUTIONS HELPS WITH YOUR UPGRADE

Staff augmentation ensures you have sufficient people and knowledge to complete a critical upgrade successfully. In fact, by requesting this service before your upgrade commences, you can ensure all planning, integration points, new or enhanced features, and other processes are in place for the most streamlined upgrade experience.

You retain full control over your dedicated expert's tasks and hours, and they ensure you have sufficient resources to cover any niche areas that fall outside your existing team's expertise.

By augmenting your team, you can keep an upgrade project moving forward efficiently and effectively. Your dedicated expert can hit the ground running at whatever stage the project is in, and you and your team will benefit from the institutional knowledge of a seasoned Hyland professional, which you can apply to future upgrades.

Often, our customers use staff augmentation for niche areas that fall outside of their team's expertise, but it's also a great strategy when faced with a tight deadline or resource crunch.

### **Beyond fast results, there are myriad of benefits to upgrading with staff augmentation:**

- The Hyland professional who joins your team will be the best person to support your environment and your upgrade, and is ready to be productive without any additional training. This means you can put the right people on the right tasks to help the team run more effectively.
- Having a Hyland expert supporting the upgrade reduces business risk and promotes a steady state in your organization. They can also tap into Hyland's entire network for additional support when needed.
- You'll gain strategic insight from the knowledge-sharing component to this service: by working side-by-side with Hyland experts, you and your team will learn new ways to maximize your solutions and investment.
- Hyland experts share best practices, training tips and shortcuts with your team, so you gain a deeper understanding of the entire upgrade process. This way, you'll have the knowledge and skills to perform a DIY upgrade in the future.



We've actually engaged with Global Services for about five years and we have great documentation from those engagements. Next, we are going to conduct our upgrade ourselves based on all of the artifacts that were provided by Hyland Services.

Integrated Records Manager at one of the top Housing Finance Agencies in the U.S.

## EXPERT CONSULTING: UPGRADE SUCCESSFULLY WITH CONSULTING SERVICES

Upgrading is a critical and often complex project to undertake. There are times when you can do it alone, and times when a full-service consulting engagement can be the best approach for your organization.

If it's your first upgrade, and your team doesn't have the experience, time or expertise in a critical area to administer an upgrade on your own, you are not alone. In fact, many of our customers have extremely capable teams who simply do not have the bandwidth to take on an upgrade in required timeframes, or want assurance that this high-profile project won't run into any unforeseen issues.

There are also times when it just makes sense to have a qualified team of experts conduct the upgrade. Not only will your team learn best practices, they will also free up time to attend to other areas of the business.

Hyland upgrade consulting services provide exactly that.

### Guiding you on your unique upgrade path

We suggest the best upgrade approach, create a checklist that's unique to your environment, and then craft a strategy that best works for your organization.

For the duration of the upgrade, you'll have a dedicated Hyland technical consultant for planning and execution, and a project manager to help you meet deadlines — whether the consulting engagement is a high-level review and planning exercise, a deep-dive assessment that includes a rewrite of API codes and scripts, or an extensive project where you are adding new modules, upgrading in multiple environments and rolling out solutions to new departments. This approach ensures a seamless upgrade experience, utilizing the most current and best methods, from planning to QA and testing. It also ensures minimal impact to operations.

Because Hyland solutions can be uniquely configured to customer requirements, all engagements begin with a planning and risk assessment to evaluate your current deployment. We'll ensure all stakeholders are on the same page and identify specific components that may need special attention.



Our IT resources who would've spent all their time deploying the upgrade is now able to engage in other higher value-added tasks. It's an expensive proposition considering the collective time commitment of two business analysts, two developers, two infrastructure people and a manager... we're probably saving nearly \$75,000 in cost.

Integrated Records Manager at one of the top Housing Finance Agencies in the U.S.

### How does consulting help with an upgrade?

- Hyland experts can handle upgrades from beginning to end, so you'll have complete peace of mind. Setup and execution follow current best practices.
- Our experts have an average tenure of five years working with the software, and undergo hundreds of hours of technical training.
- You'll benefit from the assessment, which yields insights into your platform, regardless of your experience level. You'll also gain expertise that you can apply to future upgrades.
- You decide exactly what you want help with and we customize the engagement to fit your needs.

*"It made sense for us to reach out to Hyland Global Services to help us learn how to do the upgrades with their professionals. It was worth having the external resource for the value of the individuals who were with us in every environment, literally ensuring success during go live into production."*

*Integrated Records Manager at one of the top Housing Finance Agencies in the U.S.*





## ON-DEMAND ACCESS: THE EXPERTISE YOU NEED, WHEN YOU NEED IT

Hyland solutions come in all shapes and sizes. As business processes evolve, security requirements change and technology advances — both Hyland technology and the underlying infrastructure — upgrading to the latest version can be a challenge for any customer. Even our most technically capable customers approach this task with care.

Just as all solutions are different, so are your teams supporting your solutions. Some customers are largely self-sufficient — administering, growing and optimizing their solutions without the need to engage help from outside sources. Others may be new to a Hyland solution, are still growing their teams or have other technology projects requiring available in-house resources.

Hyland Global Services offers a range of options to keep your upgrade projects moving forward. Over the years, we've learned that many customers simply want general guidance leading up to, and potentially through, the production upgrade.

We've made this easy for you to obtain, either by engaging our experts through a single upgrade consulting service engagement, or through our On-Demand Services.

For these engagements you own the upgrade project as a whole, with Hyland experts assisting and providing guidance for areas you determine.

### What are On-Demand Services?

Think of On-Demand Services as an extension of your software administration team at Hyland. Where technical support ends (software issues, defects or general functionality questions, for example), On-Demand Services begin.

This services is subscription-based, which means you have perpetual access to the experts you need, when you need them, without the need to draw up a proposal with your account manager.



## EXCERPT FROM THE HYLAND BLOG

### HOW EASY IS IT FOR YOUR ORGANIZATION TO MAKE ADJUSTMENTS TO YOUR PROCESSES TO MEET THE CHANGING DEMANDS OF CUSTOMERS?

What about adapting to meet the needs of your business? The ability to do so is what Forrester Consulting calls “agile adaptivity” in a new study commissioned by Hyland.<sup>vii</sup> The research firm identified four competency pillars as key alignment areas for mature content services strategies:

1. Agile adaptivity
2. Intelligent automation
3. Tailored solutions
4. Reimagining business models and processes

A *content services platform*, however your organization chooses to customize it, supports deployment in the cloud, on-premises or through a hybrid approach.

Out of the four competency pillars, agile adaptivity had the most support, with 87 percent of organizations viewing it as important, or very important, to the success of their content services strategies.

Content services embody the pillar of agile adaptivity, as they are built to be flexible capabilities that you can invest in as needed for a customized approach based on your organization’s needs.

# Top 10 ways On-Demand Services can help with your upgrade:

1. You want guidance on implementing new functionality, or the software upgrade process
2. You desire a second set of eyes to review your overall upgrade strategy, including checklists or plans for testing
3. You would like resources to be on standby (or actively involved) when you complete the production upgrade
4. You have completed upgrades before, but this project involves more than just the software (e.g. hardware, third-party apps, user workstation browsers/operating systems)
5. You want to bounce ideas off experts who conduct upgrades all the time (and have tools and resources at their disposal)
6. Your organization has completed upgrades before, but you know the process could go better
7. When you run into challenges, you aren't on your own
8. You want to be able to reach out and get help instead of spending days on your own trying to figure something out
9. The latest best practices, concepts and documentation
10. Your upgrade requires changes to forms, scripts or other challenging parts of your solution

# Hyland Cloud Managed Services

## ARE UPGRADES STILL A CRITICAL ROUTINE WHEN HOSTING IN THE CLOUD? THE ANSWER IS YES

**To us, the question isn't "Should you or shouldn't you upgrade?"  
It is "Why would you not want to upgrade?"**

At the heart of it all, the technical professionals at Hyland know how much research, development and customer-driven enhancements (thousands!) go into each release. It's the opportunity to continually take advantage of all of the improved capabilities of the software you already have in place.

We also understand reality.

It's easier said than done to undertake an upgrade with every release. Since every customer has a unique implementation and a varying range of expert resources in-house and available for upgrades, it's not always a simple process. This is why we've explored various options available to you that enable Global Services team members to meet you where you are in your upgrade path, and help.

Our range of options enables us to provide the right resources and experts for your exact needs, and get your on-premises based Hyland solution upgrades successfully over the finish line.

But what about when your solutions are in the Hyland Cloud?

**With any level of Hyland Cloud Service Class, upgrades are included as part of this managed service.**

All you have to do is ask — we do not force upgrades, but it's as simple as telling us you'd like to stay current, with the added benefit of getting all the newest features and functionality.



## What to expect from an upgrade with Global Cloud Services

When you request an upgrade, our Global Cloud Services team responds to the requests within two business days. They will outline the upgrade process which provides end-to-end support for the upgrade, including:

1. Coordinating the upgrade schedule
2. For customers with user testing (UT) requirements, starting with a UT upgrade if desired
3. Helping to select either parallel upgrade or an in-place upgrade
4. Upgrading and installing the software suite, which includes building any needed servers and making configuration changes related to newly deployed resources located within the Hyland Cloud
5. Updating third-party software residing in the Hyland Cloud as it pertains to functionality (such as Autonomy IDOL Server, Adobe Reader or Nuance OCR Engine)
6. Tracking all changes and implementing the production build based off the UT environment

That's the type of flexibility that allows you to truly focus on your immediate needs while improving additional processes over time.

## Reduced in-house resources required for routine upgrades?

Consider it freedom for your teams to expand the capabilities of your solutions. While our teams ensure your solutions are operating in the optimal, up-to-date environment, your teams of experts can focus their attention to other strategic areas:

- Optimizing business processes
- Developing solutions that ensure customer success and delight
- Designing project roadmaps that enable you to not only keep up with, but lead the marketplace

These areas are only a few of the myriad opportunities you'll uncover with agile, secure, leading-edge content services capabilities.



Hosting your solutions in the Hyland Cloud is a managed service, but we consider it a committed partnership.



## EXCERPT FROM THE HYLAND BLOG

### CLOUD HOSTED SOLUTIONS MEET THE DEMANDS FOR APPLICATIONS ON MULTIPLE PLATFORMS INCLUDING TABLETS AND MOBILE PHONES

The future for private clouds is very bright. The demand for applications is growing, and organizations increasingly require support for multiple platforms like tablets and mobile phones, as well as support for microservices and containerization.

To meet these demands, software vendors will be looking to offer their own private clouds. Using a private cloud gives a vendor the control it needs to support these new technologies while allowing for a continuous delivery model — getting enhancements and new features into the hands of the consumer as quickly as possible.

By necessity, private cloud providers have had to innovate and improve to stay in the market. And they have found their niche in both risk management and service delivery.

Private cloud offerings — *like the Hyland Cloud* — have embraced the advantage of being “managed” clouds. They offer the important distinction of being managed by product experts — the people behind the platform. This expert management translates into organizations needing less technical resources to monitor, upgrade, patch, procure, troubleshoot and manage the infrastructure for solutions.

Furthermore, the Hyland Cloud includes tailored compliance support that extends all the way to the application layer; 24/7/365 monitoring and built-in incident management; a team of more than 130 dedicated experts supporting cloud applications; and an architecture purpose-built for information management — all features that public clouds either can't offer or offer at an added cost. Cloud-minded organizations have many reasons to celebrate.

At the same time, organizations gain a team dedicated to security, availability and disaster recovery. At a time when IS staffing is lean and IT departments are being asked to do more with less, this is a huge benefit for any team.

# Conclusion

## A SIMPLE, REALISTIC, ATTAINABLE AND HIGHLY-COMPETITIVE COMPONENT IN YOUR TECHNOLOGY STRATEGY

Why should you regularly upgrade your Hyland solutions? Think about these simple facts:

- Data-driven technology is moving at an unprecedented pace
- Strategic business process optimization is often a benefit that follows highly current technology capabilities
- Access to the most current Hyland software versions are included with your maintenance contract

## ELIMINATE UNCERTAINTY FOR YOUR HYLAND UPGRADES WITH EXPERT GUIDANCE

Regularly upgrading your Hyland solutions, at least every two years; it's a simple concept that yields innumerable benefits. But it is not always a simple undertaking.

We understand. There are many challenges you can encounter in an upgrade — from resources, to SLAs to evolving requirements. At Hyland, we're committed to your success, and offer these simple strategies that minimize the time, risk and complexity surrounding upgrades.

Expert consultants can help guide upgrade efforts that meet the unique needs of your organization and industry. Upgrade engagements provide enduring value as you continue to optimize your business processes with emerging content services solution capabilities. This includes enhancements to user interfaces, simple, strategic use of app development capabilities, and secure collaboration and file-sharing.

## A ROUTINE UPGRADE STRATEGY IS A SIMPLE WAY TO MAKE YOUR HYLAND SOLUTIONS WORK BETTER FOR YOU

Our Global Services experts are here to meet you where you are and lead you where you need to be. We deliver on-time, predictable and successful projects — earning a reputation in the industry as a highly collaborative partner with whom you can place your trust.

Reach out to your account manager or visit [Hyland.com/TalkToAnExpert](https://www.hyland.com/TalkToAnExpert) to learn more about key upgrade strategies for your organization.

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# Hyland<sup>®</sup>

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