



A Holistic Approach to Digital Transformation

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As the non-profit association dedicated to nurturing, growing and supporting the user and supplier communities of ECM (Enterprise Content Management) and Social Business Systems, AIIM is proud to provide this research at no charge. In this way the entire community can take full advantage of the education, thought-leadership and direction provided by our work. Our objective is to present the “wisdom of the crowds” based on our 193,000-strong community.

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Process used and survey demographics

The survey results quoted in this report are taken from a series of AIIM Industry Watch reports with survey results taken from individual members of the AIIM community surveyed using a web-based tool. Invitations to take the survey were sent via email to a selection of AIIM's 193,000 registered individuals.



About AIIM

AIIM has been an advocate and supporter of information professionals for nearly 70 years. The association mission is to ensure that information professionals understand the current and future challenges of managing information assets in an era of social, mobile, cloud and big data. AIIM builds on a strong heritage of research and member service. Today, AIIM is a global, non-profit organization that provides independent research, education and certification programs to information professionals. AIIM represents the entire information management community: practitioners, technology suppliers, integrators and consultants. AIIM runs a series of training programs, which can be found at <http://www.aiim.org/Training>.



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Introduction

Working at the speed of paper is no longer an option for many businesses. Information and business critical content must be managed in digital form, integrated into end-to-end business processes, and support transactional activities. Businesses must now extend their processes beyond the traditional walls to include support of multi-channel input, remote workers, external partners, and even their customers. This means that in order to remain competitive, they must deliver an Omni-channel customer experience with access to all of the information they need, when they need it.

As a result, businesses are seeking ways to better utilize their information assets, provide a single point of access to business information, automate manual processes, improve workforce engagement at all levels, and increase collaborative capabilities with suppliers and partners.

This project will uncover the pain points and approaches organizations can take with a holistic view of their information environments, and present approaches to digital transformation supported by AIIM research data along with the analyst's commentary and recommendations.

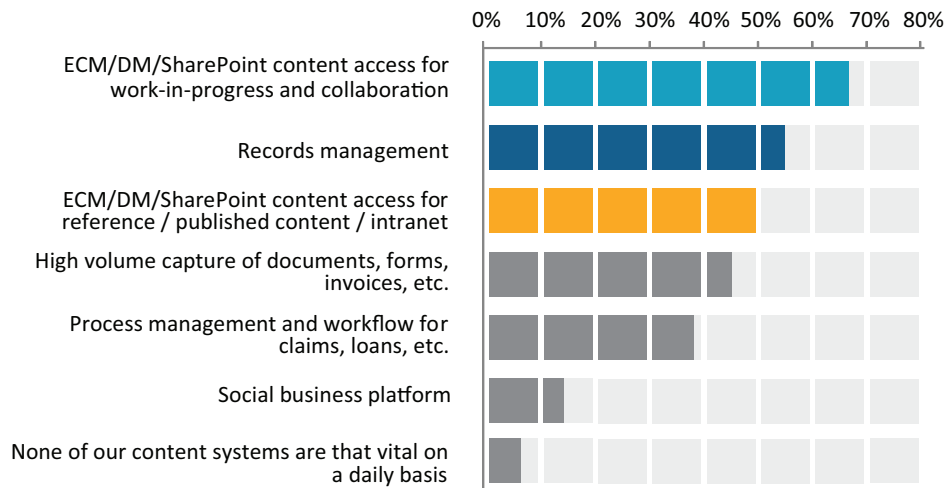


Digital Information is Critical

When AIIM first introduced the term and concept of Enterprise Content Management (ECM) more than 15 years ago, it was intended to help businesses identify and understand the importance of unstructured content and help them align their content management technologies and practices with those of the standard enterprise applications found of Finance, ERP and CRM. At the time, content for the most part was seen as there and possibly relevant, but not particularly vital to business operations. Content management was viewed by many as a strategic direction in eliminating paper stores, but the content itself not as relevant since paper was still the dominant standard of vital information for corporate records.

Today, many businesses have taken a proactive approach to connecting content with process. As such, information born digital remains digital with paper being eliminated whenever and wherever possible. As a result of this transformation, content is now viewed as business critical. AIIM Research finds that for 65% of respondents, their content management systems are considered to be business critical in relation to availability and accessibility. (Figure 1)

Figure 1. Which of the following content systems/operations would you consider to be business critical for your business in terms of availability? ¹



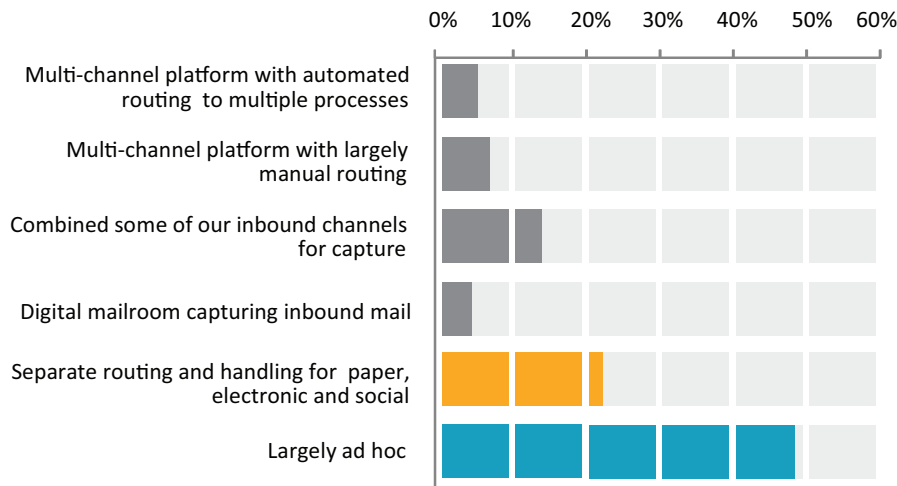


Multichannel Impact

Content is generated from many sources, both internal and external. It is generated from many applications spanning across many channels including paper, email, text messaging, and social. All the while, being of a business nature, requiring the need to capture and manage it properly. Ideally, the capture process will occur at the first touch point, whether in a mailroom or remote location as inbound paper to be scanned, as inbound digital information in the form of email and email attachments, electronic forms, or even digital photos. As a result, the role of capture system has been extended to pull together all of these inputs and present them either to line-of-business processes, or to assigned personnel for processing. This presents challenges for many businesses in their attempts to ensure accurate classification, metadata application, and security assignment.

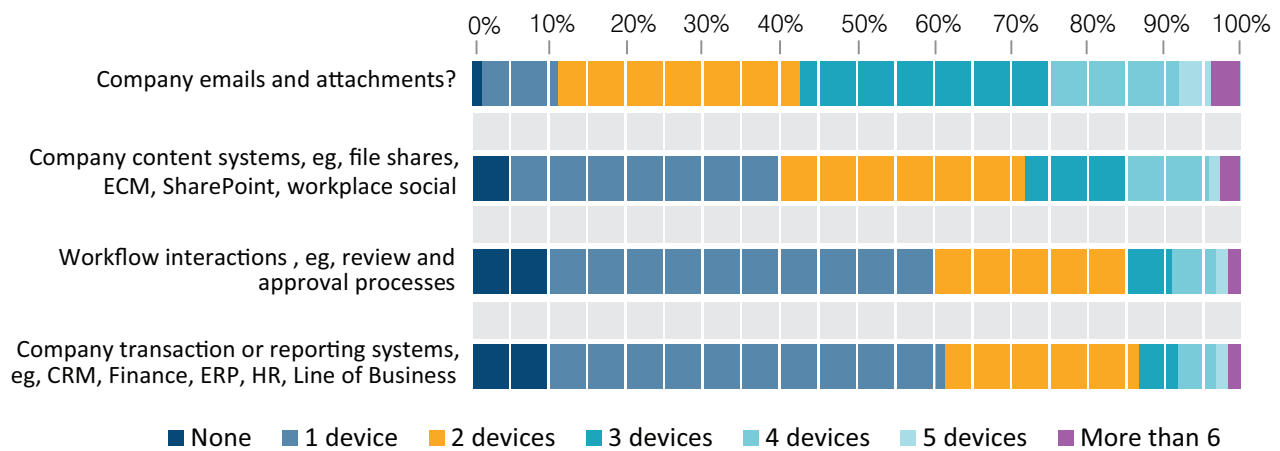
Recognition technologies combined with text analytics can automate and enhance the capture process using routing and other process automation technologies in ways that even so called “trailer documents” such as proof of identity, can be automatically identified, classified and archived appropriately. AIIM Research finds that 71% of organizations polled indicate they have scan and capture systems in place, and incorporated as part of their ECM systems. Yet even with this capability being available, 49% of AIIM Research respondents still operate in an ad-hoc manner while only 30% say they have some level of integrated multi-channel inbound capture process implemented. (Figure 2)

Figure 2. How do you deal with multi-channel inbound communications? ¹



The leads us to a discussion of where this content is used and how it is distributed. As digital transformation takes hold across the enterprise, consideration must be given to how content will be accessed, using what device, and by whom? When it comes to accessing content systems, 28% of those polled by AIIM indicate they have access across 3 or more devices. While this may be a view only situation, there is indication the of need to provide full access to ECM-stored documents. Accessing workflows and approval loops from mobile devices is increasingly important, but only 16% have this ability on three or more devices, with a similar number able to access ERP, CRM or LOB systems. (Figure 3)

Figure 3. On how many devices - desktops, laptops, tablets, phones - do you access the following: ¹



Real-time Content

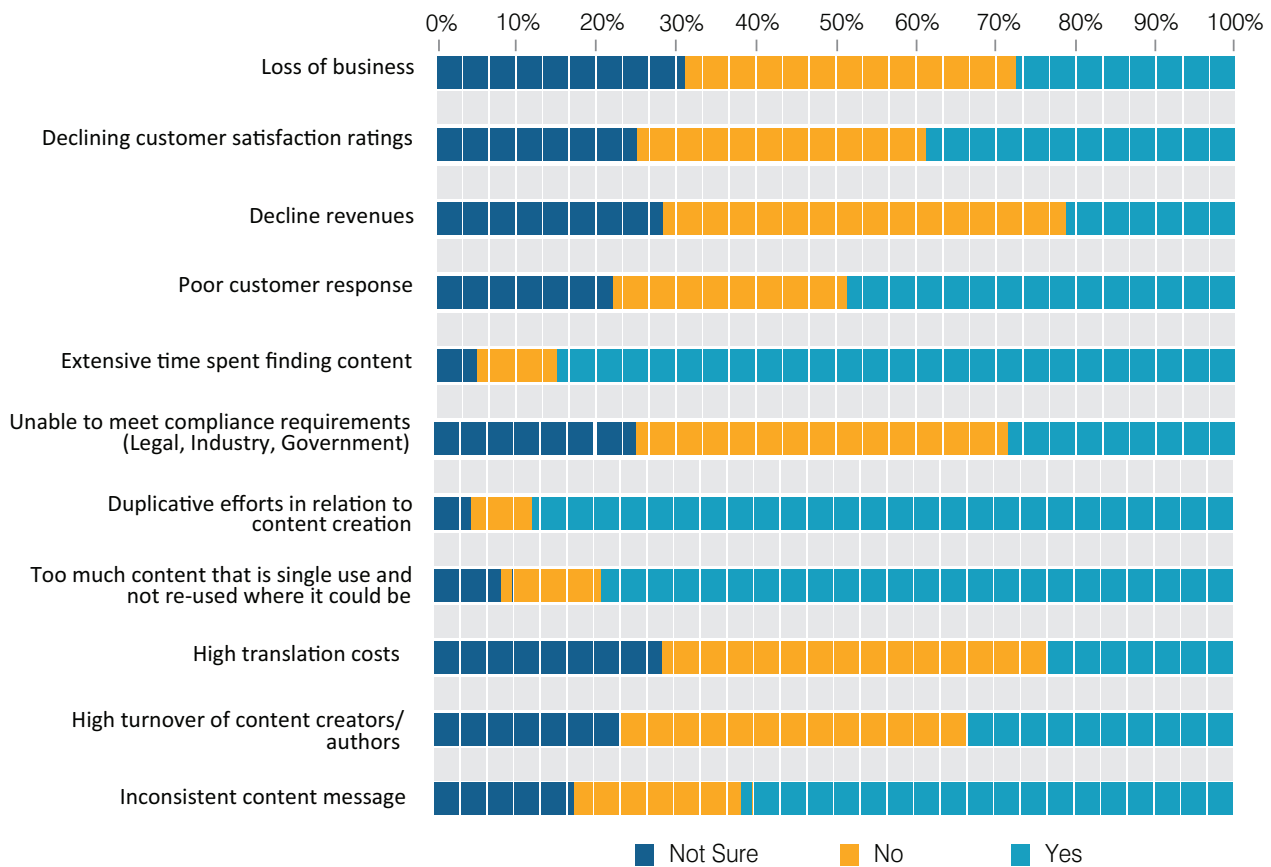
Since we understand that businesses can no longer afford to work at the speed of paper and that moving to a more digitally focused business operation is vital, the attention must then turn to digital content and ways to maximize its use and value. This means that content must be viewed multidimensionally in that it no longer gets created for a single purpose but for multiple uses.

Content should be designed, created, and shared across departments providing staff an awareness of available information and knowledge relevant their projects and cases. For example, sales rep writing a proposal should be aware of other relevant proposals, and potential issues. Case workers may be dealing with the same individual or company yet unaware of vital information due to departmental disconnect. A Real-time content approach identifies inbound content, classifies it, and when tied to appropriate profiles and workflows, sends notification to those who can benefit from it, that it is now available. This improves knowledge worker productivity and customer service, supports risk management, and increased profitability.

So what exactly do we mean by real-time content. Simply stated, it is the ability to have a live view of data in ways that provides insight, integrated with digital processes for action to be taken, in real time. One example of this is the ability for customers to order products on-line and be made available for pick up in the store nearest or most convenient for them. Other examples include the enablement of real-time negotiations between buyers and suppliers through use of a network, using real-time content – the contract - as the center of focus.

A real-time content approach increases content value through improved searchability, findability, relevance, and repurposing. Strong content management practices bring about high value and benefit while conversely, poor management practices can result in business related issues. When asked about the issues related to poor content, 87% of our respondents cite duplicative efforts as their main issues, with 85% saying they spend extensive amounts of time trying to find their content. Single use content is an issue for 79% of respondents in that it is not reused beyond its original intent. (Figure 4)

Figure 4. In your opinion, do you feel that your organization has experienced the following issues related to poor content? ²





Connecting Content to Process

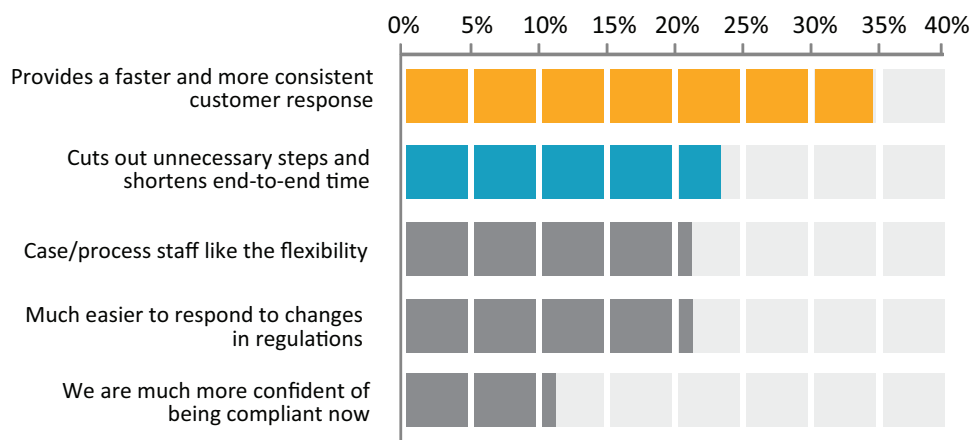
Rapidly growing businesses must support fast-moving processes. Oftentimes they have high transaction processing requirements for various segments of the business. These requirements typically include the ability to support rapid bulk processing tied to various business processes that may be automated, require manual intervention and more typically a hybrid combining both.

In the age of digital information, responsiveness to client inquiry and efficient high volume transaction processing are key. As such, transactional data drives business decisions and business processes, providing maximum benefit. This is where smart process applications begin to play an important role within an organization. Smart Process Applications (SPAs) is a term used to describe applications that use computer intelligence to extract context-relevant information from the content associated with a business process. It is then used to select, modify or re-direct the next steps in a workflow.

An example of this is in case management. Here we use the term “case” in its widest sense to refer to any process or project that has a defined beginning and end, where the process steps and outcome may change during the course of the process, and where associated content needs to be grouped and managed as a case-file or project- le. Applications can range from payment management, through contract bids, claims handling and loan origination, to traditional healthcare, crime or legal cases.

AIIM Research finds that - often a crucial element in today's competitive social media-driven environment -faster, and more consistent customer response is given as the biggest benefit. Shortening of the end-to-end process time follows, which will also help customer service, and most likely to lead to cost savings. Rules-driven compliance processes that are also flexible can make response to regulatory changes much simpler, which is a huge issue for heavily regulated industries like the financial sector.

Figure 5. What has been your experience of smart/adaptive/dynamic process applications?³





Conclusion and Recommendations

Digital transformation must be approached with a multidimensional perspective looking at not only content, but how content and process interconnect. Smart business processes are producing good results managing input across multiple channels and routing it automatically, along with the much sought after automated classification of captured content into records archives and automated business processes.

It is not enough to address one part of a process. The greatest gains are derived from a holistic approach that addresses end-to-end processes and their related information assets. Organizations must look to automate manual processes, and increase collaborative capabilities beginning with a strategy for maximizing use multi-channel inputs, turning content from a static element into real time content that is available to and useable by all who need it, and connecting processes and transactions in ways that streamline and improve operating efficiencies. Process without content serves no purpose and content without process goes nowhere. The time is now to move forward toward with digital transformation initiatives that provide seamless, efficient, and effective access and transactional capabilities across the enterprise.



Recommendations

Consider taking the following steps:

- In evaluating these options, look for smart capabilities that monitor content as well as process.
- In order to better handle high volumes or a wide variety of inbound content, automate routing and sorting at the point of capture in order to speed up response and improve productivity.
- Assess and address the accessibility needs of your user audience in terms of multi-channel distribution.
- Investigate existing best practices and technology in place within your organization and industry.
- Conduct content audits to identify what is being created and how it is being created, managed, used and syndicated across the enterprise.
- Establish governance policies and the use of standards.
- Assess the needs and requirements of content users as they relate the interaction with end-to-end processes; how content enters a process, who uses it while it is in the process, what happens to it, and where it goes when the process is complete.



References

- 1 AIIM Industry Watch titled "ECM Decisions - strategic options for managing, accessing, and preserving content"
- 2 AIIM White Paper titled "innovating Content Creation and Reuse"
- 3 AIIM Industry Watch titled "Case Management and Smart Process Applications"

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AIIM (www.aiim.org) AIIM is the global community of information professionals. We provide the education, research and certification that information professionals need to manage and share information assets in an era of mobile, social, cloud and big data.

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