eBook

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EMBRACING CONTENT SERVICES: SETTING THE VISION FOR YOUR ORGANIZATION

In Partnership with

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Process Used & Survey Demographics

The results of the survey and the market commentary made in this report are independent of any bias from the vendor community or the underwriter of this report. The survey was taken using a web-based tool collecting 120 responses during the month of January, 2018. Invitations to take the survey were sent via email to a selection of the AIIM community members and through various social media outlets. Survey demographics can be found in Appendix 1.

About the Author

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Bob Larrivee is Vice President and Chief Analyst of AIIM Market Intelligence. Internationally recognized as a subject matter expert and thought leader with over thirty years of experience in the fields of information and process management, Bob is an avid techie with a focus on process improvement, and applying advanced technologies to solve business problems, improve business processes, and automate business operations.

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About AIIM

aiim

Here at AIIM, we believe that information is your most important asset and we want to teach you the skills to manage it. We've felt this way since 1943, back when this community was founded.

Sure, the technology has come a long way since then and the variety of information we're managing has changed a lot, but one tenet has remained constant. We've always focused on the intersection of people, processes, and information. We help organizations put information to work.

AIIM is a non-profit organization that provides independent research, training, and certification for information professionals. Visit us at www.aiim.org.

Introduction

The term "content services" represents the evolution of the enterprise content management (ECM) industry. But what does that mean? And as information professionals, what does it mean to you?

For many, ECM is a centralized platform positioned to consolidate the storage of digital content. It programmatically integrates with other applications and has an end goal of delivering information to the user community when and where they need it. However, the reality for many organizations is that they use more than one content repository. Added to this is the growing demand to only purchase needed functionality, not an entire product suite where only a portion will be used.

In today's world of digitally transforming businesses, intelligent information management takes center stage. The focus is on modernizing the information ecosystem, digitalizing core organizational processes, automating compliance and governance, and leveraging machine learning to enhance customer experience. And for all of these, content services plays an essential role.

A content services approach takes a strategic and more holistic method to solving content-related problems regardless of repository. It leverages those technologies that meet today's needs, not six months to a year from now. It enables businesses to capitalize on existing investments while, at the same time, extending and expanding their capabilities beyond corporate walls to remote workers, partners and clients, making content more useable and processes more interactive.

As you read this eBook, think about your organization and how a content services approach would impact it. Think about your real-world scenarios and how what you read here can apply to your organization.

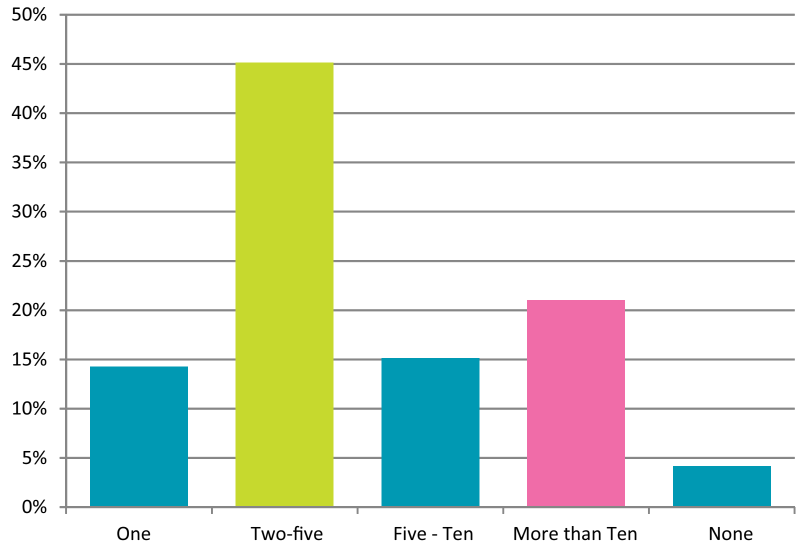
Key Findings

- **Twenty-one percent of those polled report having more than 10 systems defined as ECM or content management systems.** Forty-five percent report having between two and five ECM systems.
- **Siloed content across different repositories and applications is still the largest content-related business challenge for 66 percent of respondents.** For 53 percent, searchability is the largest content-related challenge while for 51 percent, it's duplication across repositories.
- **Sixty-two percent of respondents said they are unfamiliar with low code/no code BPM technology while 26 percent indicate they are familiar with it.** Three percent said they are currently using low code/no code BPM while 32 percent indicate plans to purchase this technology in the future.
- **Forty percent of respondents said they have a vague understanding of the differences between ECM and content services but cannot effectively describe them.** Thirty-one percent report the details are scarce and the difference is not clear.
- **Seventy-four percent of those polled agree (48 percent) or strongly agree (26 percent) that they would prefer to pick and choose the content management capabilities they need for a particular problem rather than buying everything.** When it comes to their current systems' capabilities, 54 percent report they are struggling with content analytics.
- **When asked what they are looking for in a content management solution, 47 percent seek a unified view of their information.** Forty-three percent want connectivity and integration to other business systems and 42 percent want advanced integrations between their systems and content.
- **According to 51 percent of respondents, the main business driver for improving content management, is to reduce the number of information silos.** Forty-five percent are looking to improve customer service within their front-office interactions while 35 percent seek to increase back-office efficiencies.

General Perceptions

Before delving into the topic of content services, it's imperative to know where organizations stand. That's why we asked respondents to identify the number of ECM or content management systems their organization has installed. Forty-five percent report having between two and five systems while 21 percent said they have more than 10 systems. These systems are used to store, manage, access, and interact with business content. (Figure 1)

Figure 1: How many systems do you currently have that you would define as ECM or content management (that are being used to store, manage, access and interact with business content)?

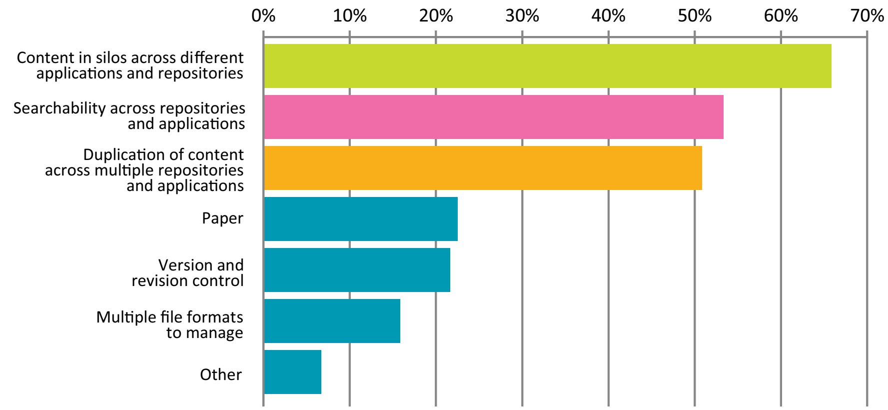


With so many systems in place, one can imagine the challenge it is to manage and maintain all of them. In a well-planned environment, these would be synchronized or, at a minimum, provide some level of interoperability that allows the user community to access information across repositories.

However, our results reveal that the top challenge for 66 percent of respondents is that of siloed content across different repositories and applications. Fifty-three percent reported searchability as their biggest challenge while 51 percent said it was duplication of content, in that they find multiple copies of content across their repositories and applications. This is not only an administrative cost factor, but a risk factor in terms of audit and litigation. (Figure 2)

Although most organizations embrace content management practices at some level, it is clear that not all are taking a comprehensive, strategic approach. As one respondent told us, "It is a challenge just to get management to buy in to proper strategies and take ownership."

Figure 2: What are the largest content-related business challenges you're facing today?



While many organizations are familiar with the concept of content management and can cite their needs for it, a large portion do not understand the terminology used to describe it. That was the case when we asked our respondents: How well is the term "enterprise content management" (ECM) understood by your organization? Forty-five percent said they did not understand ECM at all (11 percent) or lacked an understanding (34 percent). Only 9 percent indicated that their organization had a good understanding of ECM across the organization. (Figure 3)

When asked about the term content services (CS), 43 percent said they did not understand it at all (24 percent) or lacked an understanding (19 percent). However, 29 percent indicated that there is a good understanding of CS across the organization. One might think that since the term ECM has been around longer, this would be the other way around; however, 20 percent more respondents cited that their organizations are more familiar with the term CS than ECM. (Figure 4)

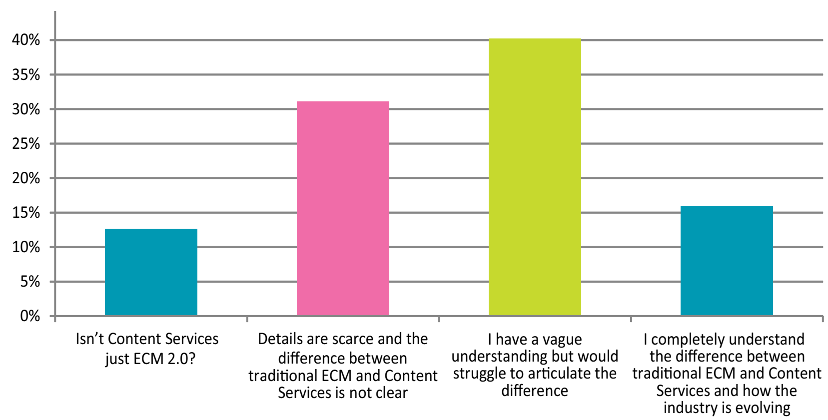
Figure 3. How well is the term "Enterprise Content Management" (ECM) understood by your organization?		Figure 4. How well is the term "Content Services" (CS) understood by your organization?	
Not at all understood	11%	Not at all understood	24%
Lacking understanding	34%	Lacking understanding	19%
Neutral	6%	Neutral	10%
Somewhat understood	23%	Somewhat understood	14%
Well understood by my organization	9%	Well understood by my organization	29%

Note: 82% of respondents answered these questions

Taking this a step further, we asked how well the differences between ECM and CS are understood and found that 40 percent of respondents have a vague understanding but would struggle to effectively articulate the differences. Thirty-one percent said the difference is not clear. (Figure 5)

With these results in mind, it appears that CS is better understood than ECM — yet both are still unclear for nearly half of respondents. This points to a need for education regarding both content management strategies and an understanding of how ECM has evolved into CS.

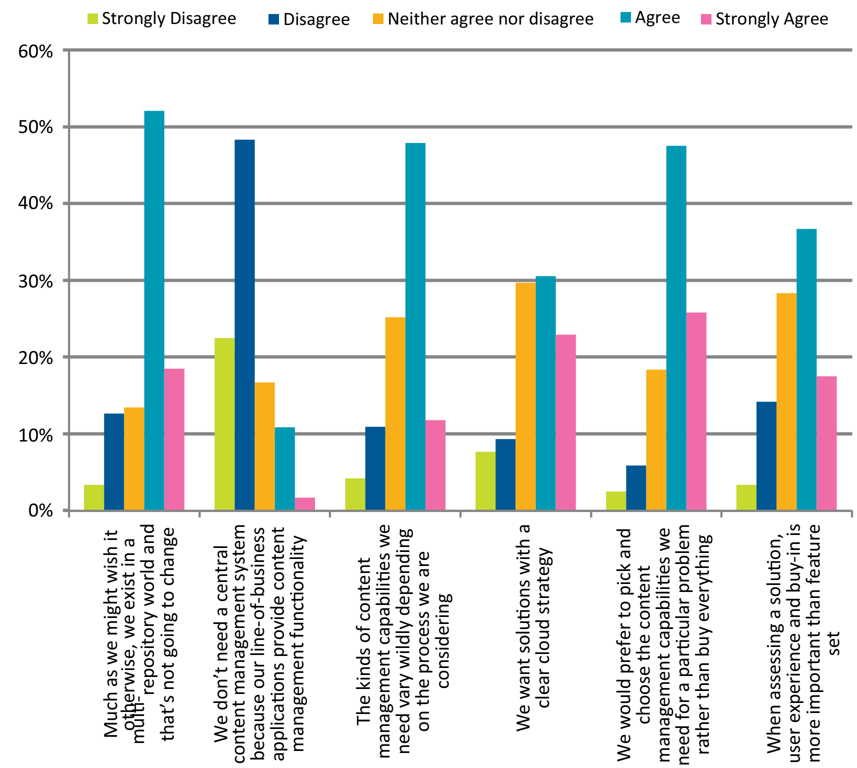
Figure 5: How well do you understand the difference between ECM and content services?



One of the tenants of CS is that organizations can pick and choose the content capabilities or functions they need as opposed to purchasing an all-inclusive product suite. When discussing this with our respondents, a total of 74 percent agree (48 percent) or strongly agree (26 percent) that they would prefer to pick and choose the content management capabilities they need for a particular problem rather than buy everything at once.

Although ECM made the promise of only needing to utilize one content repository, CS has moved away from this concept. And our respondents side with this notion: 70 percent agree (52 percent) or strongly agree (18 percent) that as much as we might wish it otherwise, we exist in a multi-repository world and that's not going to change. (Figure 6)

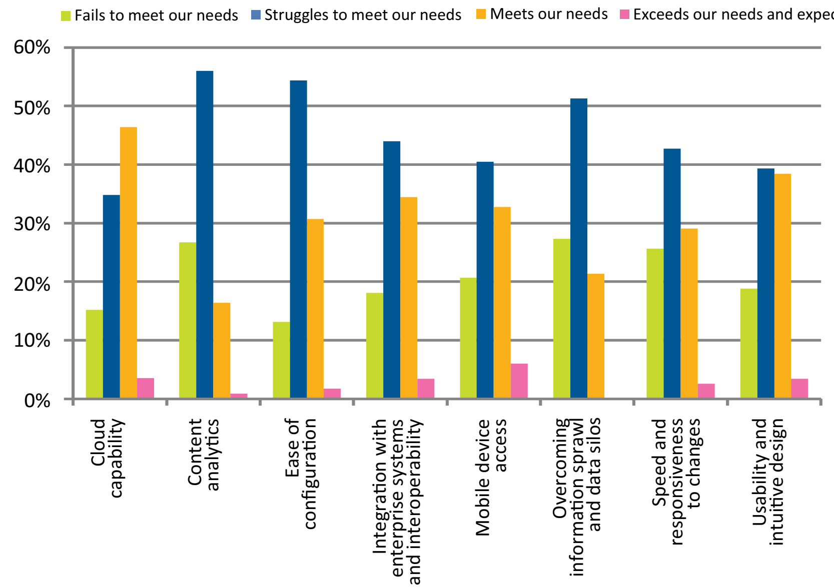
Figure 6: To what extent do you agree or disagree with the following statements?



This leads us to question the level of satisfaction our respondents have with their existing systems and whether they meet core needs. Regarding content analytics, 54 percent said their existing systems struggle in this area while 27 percent said they fail in overcoming information sprawl and data silos.

Additionally, supporting a theme we saw emerge across the study, one respondent said: "Integration is still a huge issue since standards like CMIS have not really been adopted well by the new generation of services, many of whom still use their own APIs, and we find that CMIS has failed to keep up with the growing needs."

Figure 7: How well do your existing IM/DM/RM/ECM systems meet your needs in the following core areas?

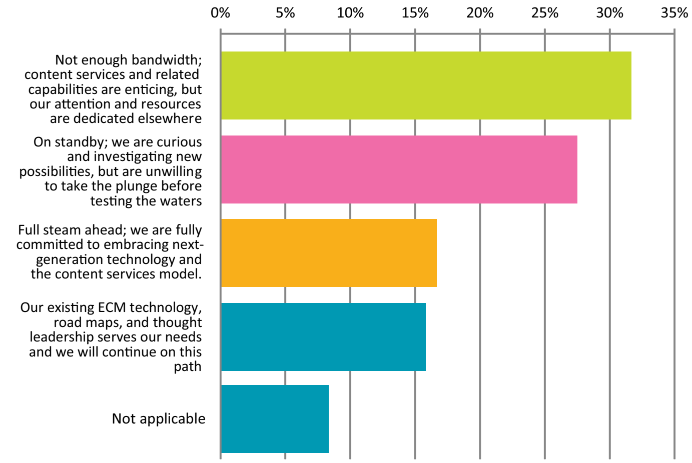


Although many organizations still have a great deal of needs to be addressed by their content management system(s), 32 percent of respondents said they do not currently have enough bandwidth to fully embrace content services, and their attention and resources are dedicated elsewhere.

Additionally, 28 percent said they are curious and investigating new possibilities, but are on standby and unwilling to take the plunge before testing the waters. (Figure 8) This is typical with any shift in technology. Many organizations will wait until it has been in place for some time and "proven" before taking steps to adopt it.

However, we did find that 17 percent of respondents are taking a lead position, moving forward to embrace CS and get ahead of the curve. It is these forward-thinking organizations who will quickly find ways to expand their use of CS across the enterprise to gain greater advantage and value.

Figure 8: How would you best describe your organization's early experience with content services, or steps you have taken to investigate the next generation of content management?



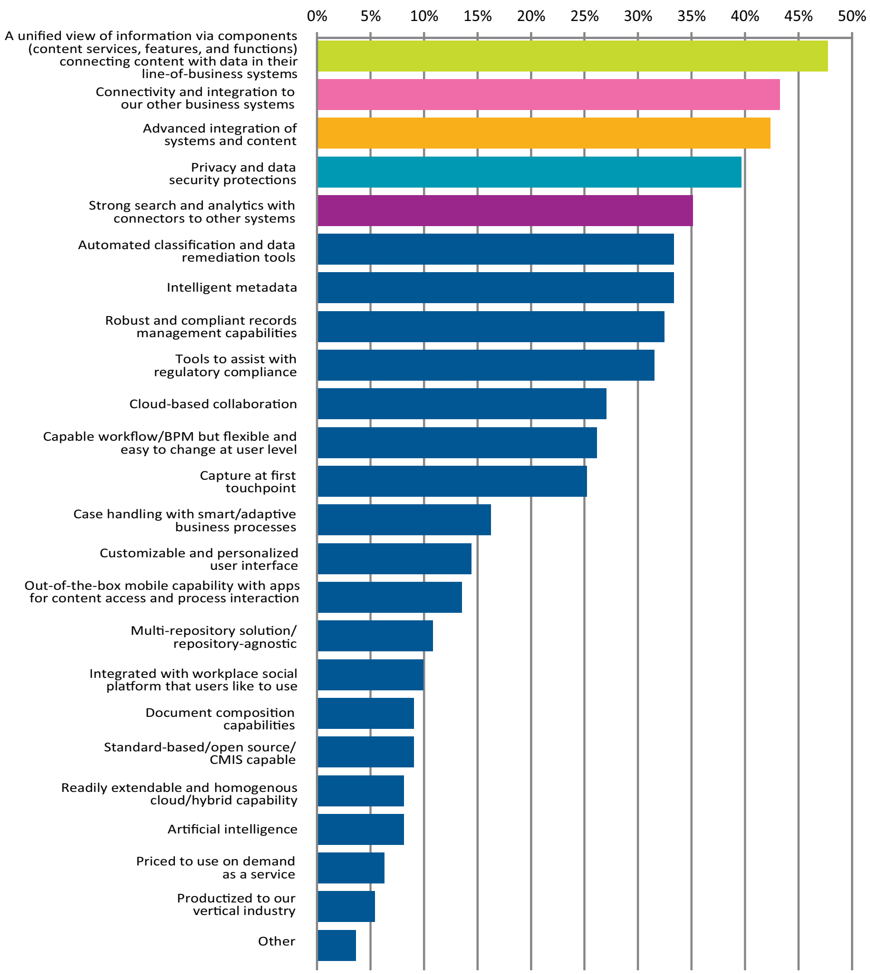
Capabilities

If expectations are not being met with current systems and organizations are already investigating the new generation of content management, it begs the question: What are consumers specifically looking for in a solution? We asked our audience to identify their top five functional requirements for a content management solution. (Figure 9) Here they are in order of popularity:

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

There is clearly an overwhelming demand to connect data and strengthen the information ecosystem, reinforcing the statement and disappointment expressed earlier over the lack of integration and interoperability between existing systems. Even the fith choice has this theme with the reference to "connectors to other systems," indicating that search and analytical tools must also have this capability.

Figure 9: Please select your top five functional requirements for a content management solution.

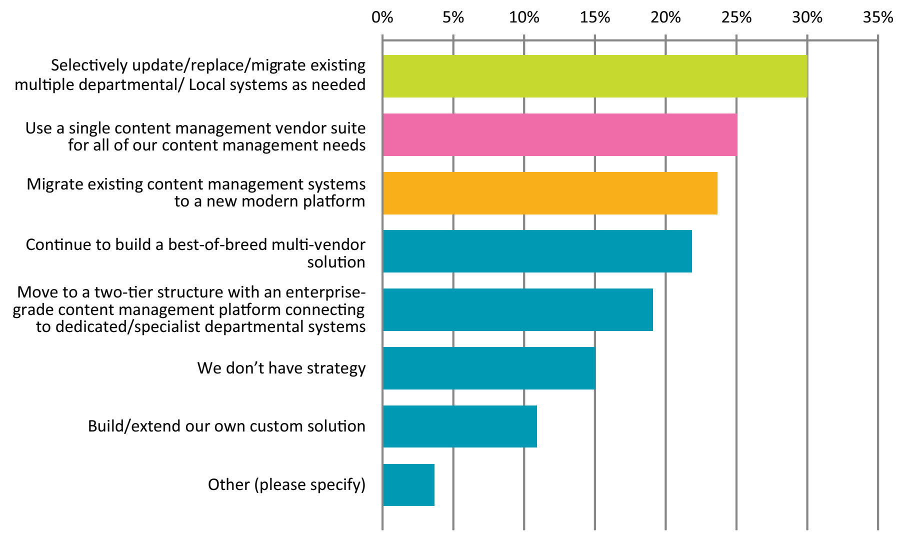


Given what we now know, what strategy do organizations embrace moving forward? If existing systems do not meet all demands, how will organizations approach content management in the future?

According to 30 percent of respondents, the plan is to selectively update, replace or migrate existing systems as needed while 25 percent will use a single vendor suite to meet their needs. Twenty-four percent plan to migrate their existing systems to a modern platform. (Figure 10)

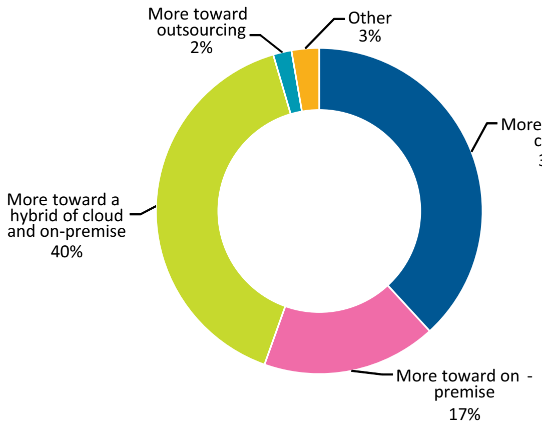
We also found that 15 percent of respondents do not have a strategy at this time, indicating they have yet to start planning for tomorrow and are reacting to what is happening today. For these organizations, the time will come when action will be required, and decisions will have to be made — and hopefully they will be the right ones. Without a strategy and planning, it is easy to make a wrong, and often costly, choice.

Figure 10: How would you best describe your content management strategy going forward?



Many organizations look to protect their current investments while extending and expanding their information ecosystem to meet new and growing demands. The question then becomes one of deployment in relation to enhancements and services. When asked about deployment methods over the next two years, 40 percent of respondents plan to focus on a hybrid approach, utilizing both on-premises and cloud deployments while 38 percent said they will deploy cloud solutions. Seventeen percent will focus solely on on-premises deployments. (Figure 11)

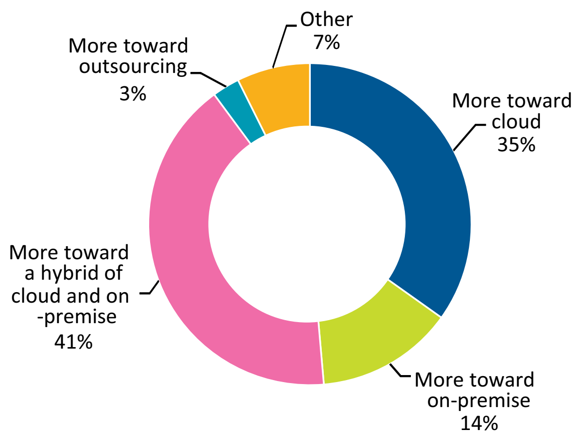
Figure 11: How do you view your delivery/deployment methods for content management within the next two years?



Purchase Outlook

We now know what organizations need in terms of content management capabilities and their desired deployment method, but how will they prioritize purchase decisions and focus on growth in the next two years? The majority (41 percent) of respondents indicate that their focus will be on hybrid on-premises/cloud purchases while 35 percent will focus solely on cloud. Fourteen percent plan on purchasing on-premises content services. (Figure 12)

Figure 12: Will your purchase options focus on content services within the next two years?

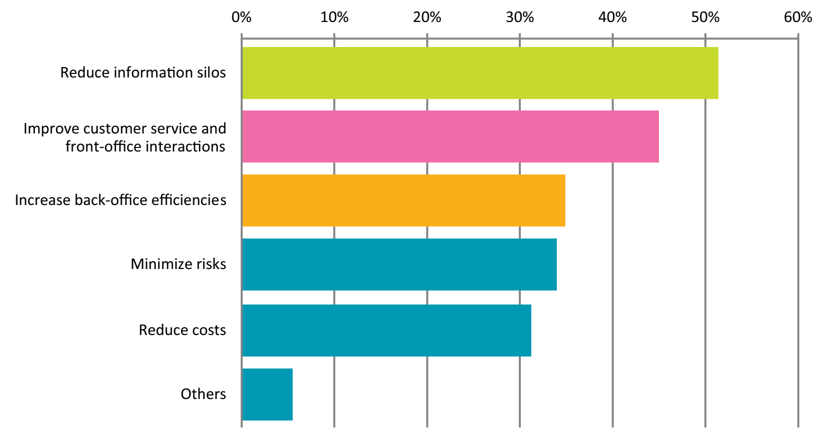


Evaluations for future purchases will be conducted by the CIO/COO for 32 percent of respondents, line-of-business managers for 25 percent, and IT for 23 percent. (Figure 13) When it comes to making the decision, it is the CIO/COO who will make the final call, according to 57 percent of respondents. For 17 percent, it is the line-of-business manager, and for 10 percent it is IT. (Figure 14)

Figure 13. Solution evaluations going forward will be made by:		Figure 14. Solution decisions going forward will be made by:	
CIO/COO	32%	CIO/COO	57%
Line-of-Business Managers	25%	Line-of-Business Managers	17%
IT Personnel	23%	IT Personnel	10%
End Users	5%	End Users	1%
Chief Process Officer	4%	Chief Process Officer	5%
External Consultant	3%	External Consultant	0%
Other	8%	Other	10%

When we look at what's driving businesses to improve their content management strategies, 51 percent said it's to reduce the number of information silos and 45 percent said it's to improve their customer service and front-office interactions. Following these drivers are the need to increase back-office efficiencies for 35 percent of respondents, indicating that while this has been on the agenda for many years, there are still opportunities to improve this critical area. (Figure 15)

Figure 15: Looking ahead into 2018 and beyond, what are your main business drivers for improving your content management strategy?



Conclusion

Although there is some confusion regarding the terms ECM and content services, many understand and agree that content services represents a variation that is closer to market demand for component-level content management than the more traditional ECM model. It is also clear that integrations across systems, repositories, and applications is needed — and yet is still lacking — for many at both the system and search level.

Today, organizations see the need to look beyond 2018 but are cautious in how they will approach content services. 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.

And, as we see in this study, the CIO and COO are taking a lead role in the evaluation and decision-making process; however, this should not be a siloed effort. It should be a team effort that engages multiple departments and even external customers who will be impacted by any proposed changes.

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 from this report (restated below). Identify your strengths and weaknesses then work to improve in those areas.

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

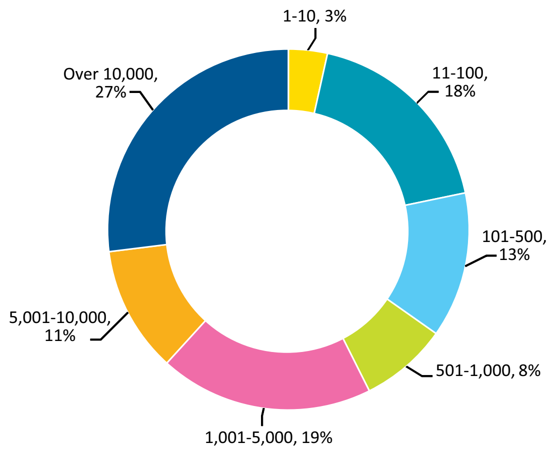
- Fifty-four percent of respondents said their existing systems struggle with content analytics while 27 percent said they fail in overcoming information sprawl and data silos. If you are unhappy with the performance of your current system, document the reasons why and work to change the situation either with your current supplier or a third party who can fill this need.
- Our research indicates that an individual or single department is likely to evaluate and/or make the purchase decision. However, the best approach involves working as a team to develop the business and functional requirements, evaluate potential solutions, and make the decision collectively. This approach provides greater assurance that the business needs are met within the approved IT framework, and user involvement brings about a higher rate of adoption.
- Establish a continuous improvement program that will equip you to periodically review and refine changes made. When a CS project ends, it should be the beginning of an on-going process improvement practice that looks for ways to improve upon the foundation and extend those capabilities to other departments within the organization.

If unsure of where or how to begin, seek professional assistance and/or training to help determine the right path. Look to current suppliers and service providers for guidance. Turn to professional associations and peers to find advice and training that will provide best practices. When it comes to the evolving content management space, is better to take a step forward and learn than to take no step and fall behind.

Appendix 1: Survey Demographics

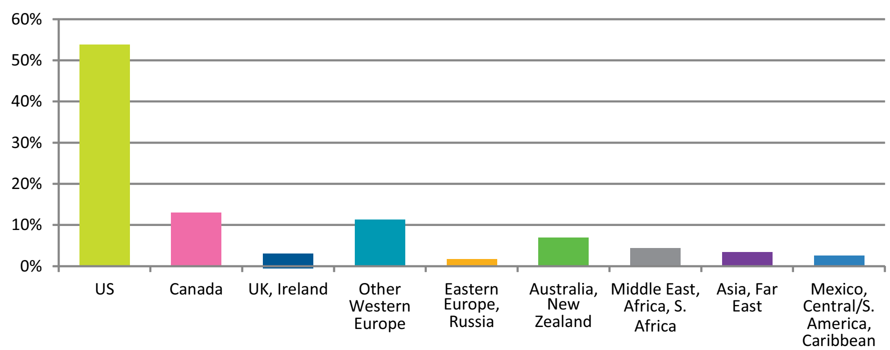
Organizational Size

AIIM survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 38 percent, with mid-sized organizations of 501 to 5,000 employees at 27 percent. Small-to-mid sized organizations with 1 to 500 employees represented the largest segment of survey takers at 34 percent.



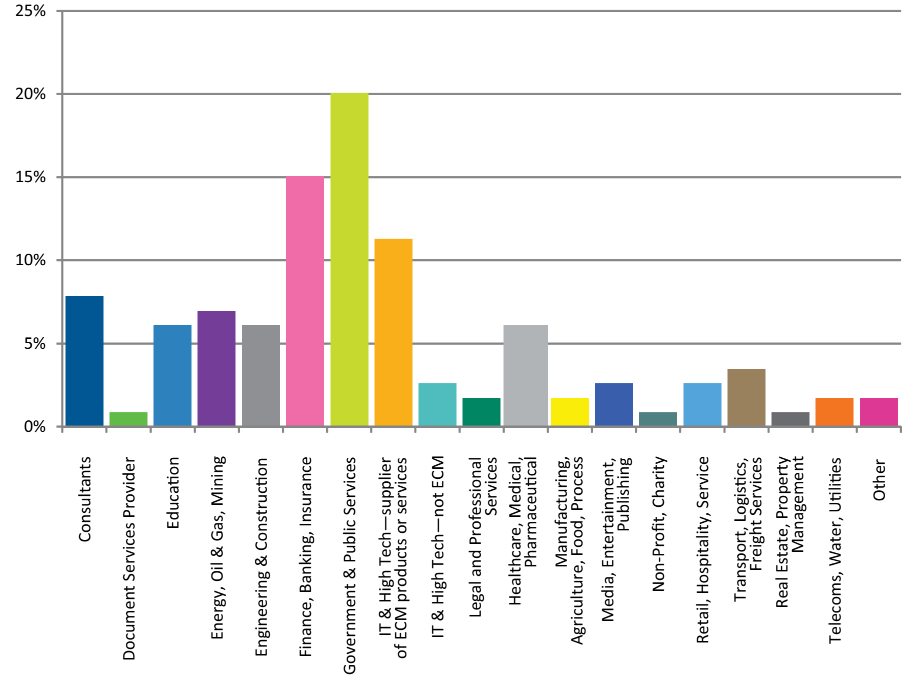
Geography

Sixty-seven percent of the participants are based in North America, with 20 percent from EMEA-R, and 13 percent from the rest of world.



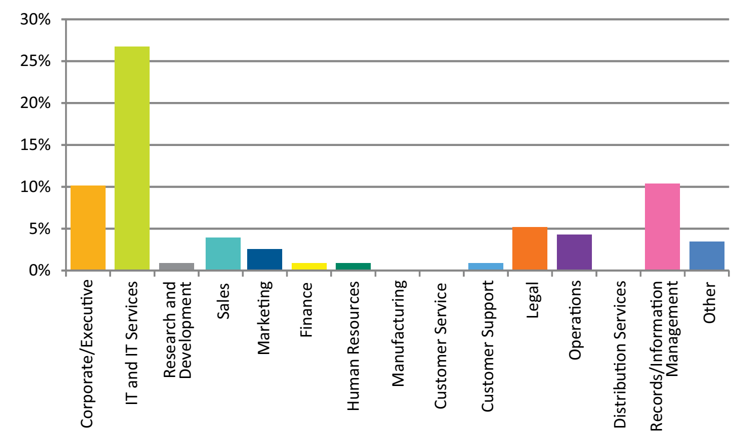
Industry Sector

Local and national government together make up 20 percent; finance, banking, and insurance attribute 15 percent; and energy, oil and gas attribute 7 percent.



Departments

Twenty-seven percent of departments represented are from IT/IT services. Corporate executives represent 10 percent, and 7 percent come from records and information management.



Appendix 2: Open-ended Comments

Respondents were able to provide open-ended comments about content services. Here are some of their responses:

- The name keeps changing, but the business concepts don't change, we just implement the tech a little differently.
- The definition of content services is squishy and doesn't really yet demonstrate to me a new way of designing, maintaining, or consuming information. It's early, and I think we're going to land somewhere around a user-centered experience which doesn't rely on a lot of enterprise work up front to wrangle the data. Everyone promises that today, but no one really delivers yet.
- I believe most content services and solutions need to start with what kind and quality of info do you want going out the door to key audiences. All content services solutions will flow from that.
- Records vendors need to step up on the delivery of repository-agnostic records services/capabilities.
- Organisations see this as a software implementation — put in a database and it will resolve all issues — what about process, behavioral and habit shifts? Capability and organisational needs need to be aligned to business goals and vision. More education around process and change management needs to be applied in the market place.
- There needs to be solutions that are flexible to accommodate different group/departmental needs that don't require integrating numerous new systems.
- Content services is just another promise to deliver solutions that ECM never delivered. It is a hype pushed by Gartner in the cloud context. I do not see the added value at all as we cannot put content into the cloud for safety and business continuity reasons.

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About Hyland

Hyland

Hyland is a leader in providing software solutions for managing content, processes and cases for organizations across the globe.

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About AIIM

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