A Winning ECM Recipe:
Simplicity On The Frontend - Sophistication On The Backend

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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 80,000-strong community.

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M-Files
5050 Quorum Drive
Suite 600
Dallas, TX 75254 USA
972.516.4210

Process used and survey demographics

The survey results quoted in this report are taken from a variety of industry reports released by AIIM, collected 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 80,000 registered individuals. 49% of the respondents are from North America and 26% from Europe. They cover a representative spread of various industry sectors. Results from organizations of less than 11 employees have not been included, bringing the total respondents to 158.

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.

About the author

Bob Larrivee is Director of Custom Research at AIIM, and an internationally recognized 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 the application of advanced technologies to enhance and automate business operations.

Introduction

The issue of enterprise content management (ECM) system complexity, and the resulting low user adoption rates of these solutions, has been well documented and continues to be an ongoing problem. As part of their daily activities, employees are required to work with both structured information — that which is stored within line-of-business applications like CRM, HR, ERP, etc. — and unstructured information that includes documents, audio and video files, digital photos, and scanned images. It is here, the unstructured side of the equation, where employees feel it is often too complex or cumbersome to store and find information within their company's ECM system, and as a result, choose to store and share it outside of the ECM environment.

When looking at where content is stored, 61% of respondents to a recent AIIM study indicate that half or more of their content is managed outside of an ECM or document management (DM) system, in other enterprise systems like CRM, ERP, CRM, and so on. (Figure 1) This is further compounded when you consider that many information assets are also stored in email systems, network drives, applications like SharePoint and file share services like Box, DropBox, Google Drive and OneDrive.

Further research finds that 81% of organizations indicate having a limited ability to search across multiple repositories to find the information they need, further justifying the employees' reasoning for avoiding the company ECM system, as there often is no simple way to search across systems.

Figure 1. What portion of your unstructured content and documents (excluding emails) would you say is stored in other enterprise systems (ERP, HR, Finance, CRM, Project Management, LOB, Etc.) rather than your ECM/DM systems, and is not accessible through your ECM/DM system(s)?[1]

% of organizations

0% of content	
10% of content	
20% of content	
30% of content	
40% of content	
50% of content	
60% of content	
70% of content	
80% of content	
90% of content	

This means that employees are spending unnecessary amounts of time and energy searching across various content repositories and enterprise systems in hopes of finding documents, files and other information they need to do their job.

Setting up a simple-to-use yet robust and compliant ECM environment is paramount if organizations expect their employees to embrace the system and maximize the benefits that can be achieved with it. Successful ECM implementations begin with user engagement from requirements gathering and solution evaluation on through the life of the project, from start to post implementation follow-up. User adoption is essential to ensure business needs are met, compliance is maintained and information management practices are carried out consistently across the department and enterprise. One of the primary objectives in involving users in the ECM system selection and deployment process is to ensure that simplicity in storing and accessing required and relevant information — no matter where it resides — is a top priority.

By extending the ECM environment beyond internal systems to cloud, social, and mobile, benefits are gained in supporting the functional requirements of the workforce, improving operating efficiencies and increasing responsiveness to changing regulatory and market conditions. While connecting systems, repositories and processes on the back end is critical for ensuring that users can quickly find the information they need, it is just as critical that emphasis be placed on its usability on the front end.
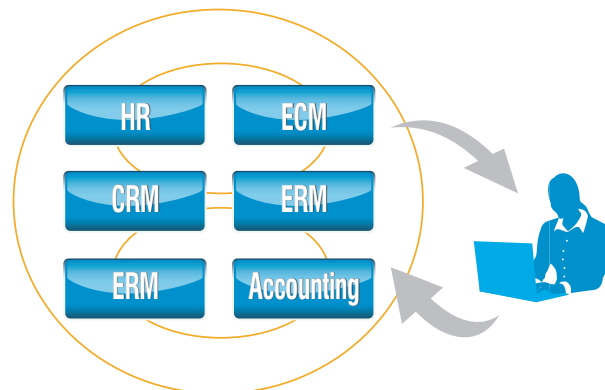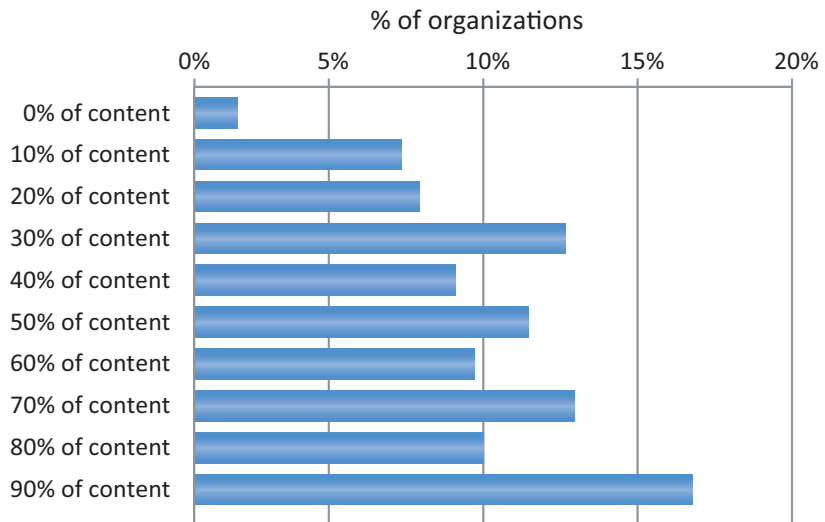
The most effective approach is to develop an ECM environment that brings people, processes, policies and technologies together through a simple interface that drives high levels of user acceptance and engagement, simplifies retrieval and supports compliance.

Simplify Content Collaboration - Internally and Externally

Employees are turning to the many consumer grade file share and sync applications for storing and sharing company content with people inside and outside of their organization — and often doing so without their employer's knowledge or consent.

According to a recent AIIM study, more than 1 in 4 organizations indicate they are seeing unofficial use of cloud-based file sharing sites by their employees. (Figure 2) This sidestepping of corporately sanctioned ECM solutions places the organization at risk of non-compliance, increases vulnerability to unauthorized access and represents a lack of confidence among the staff in corporate systems. The reason employees are gravitating toward these types of solutions is because they are easy to use, can be up and running in minutes without IT assistance, formal training or corporate involvement.

Figure 2. Which of the following content access mechanisms are happening in your organization?[1]
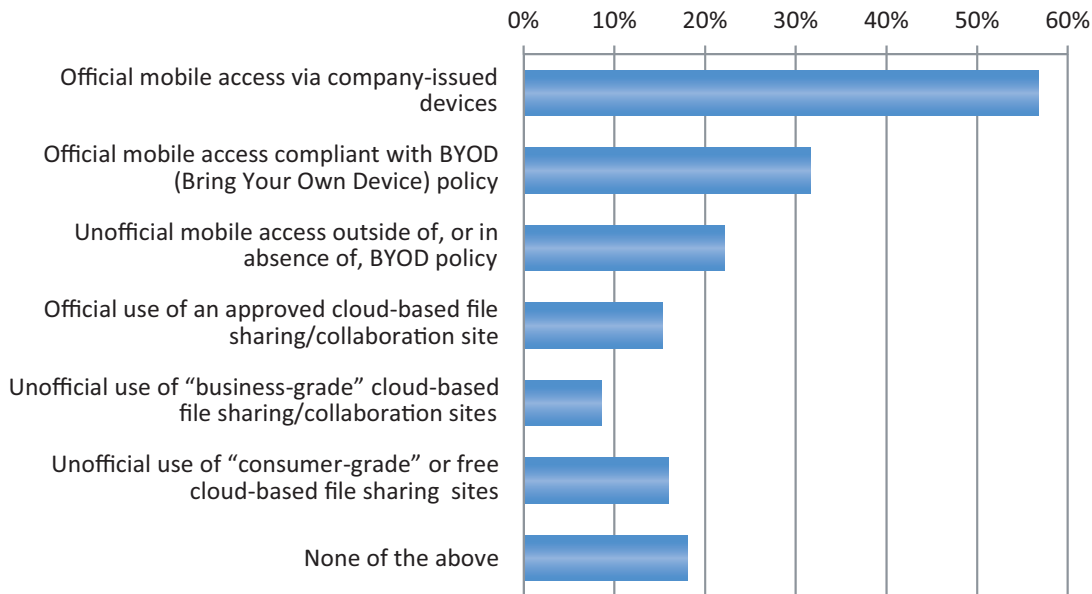
One of the challenges for organizations in establishing an effective and widely-adopted ECM environment is the provision of collaborative capabilities with straightforward information sharing functionality — versus only providing static repositories where content is housed. Users must have access to content from anywhere, at any time and on any device — while also enabling the organization to maintain strict control over its information assets and support compliance requirements.

Evaluate ECM solutions with the ability to support collaborative content development with internal and external participants in a secure and controlled manner. Also look for systems that place an emphasis on simplicity in how users store, access and share content. Ensure that the ECM system can support your organization's security and compliance requirements without adding complexity for users.

Empower Your Remote Workforce

Key business activities and processes occur outside of the corporate walls every day. For insurance adjusters, business often takes place at a disaster location. For a project manager working for an oil and gas company, it could be on a platform in the ocean. An effective ECM environment must be inclusive of an organization's mobile and remote workforce, and have the ability to extend beyond employees to include external partners, suppliers, regulators and customers. More now than ever before, professionals demand access to business critical information at any time and from anywhere with the expectation that corporate applications should be as simple to use as the applications they use in their personal lives.

AIIM Research finds that for 59% of organizations, mobile access to content is very important or vital. 30% of organizations say they need their employees to interact with workflows from their mobile devices, with 22% indicating mobile capture is very important (Figure 3).

Figure 3. How important are the following to your organization?[1]
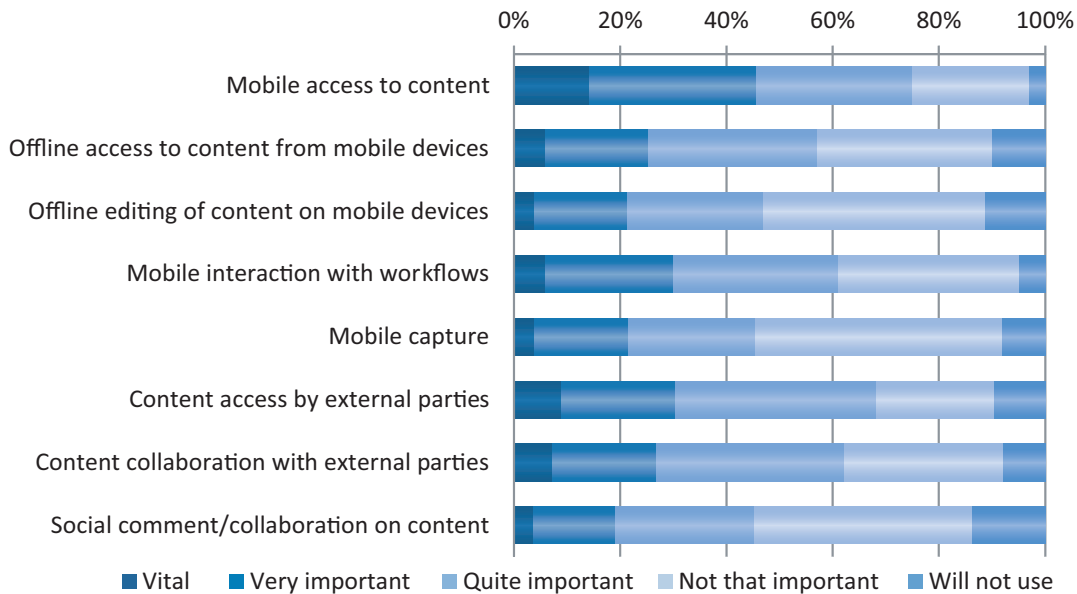
In order to enable your employees to easily collaborate, retrieve, manage, and share information from anywhere at any time, look for an ECM system that provide mobile apps on all of the most popular devices (iPhone/iPad, Android, Windows Phone). In addition, ensure the ECM system's mobile apps provide a user experience that is friendly, without trading off functionality, such as document control, workflow and compliance support.
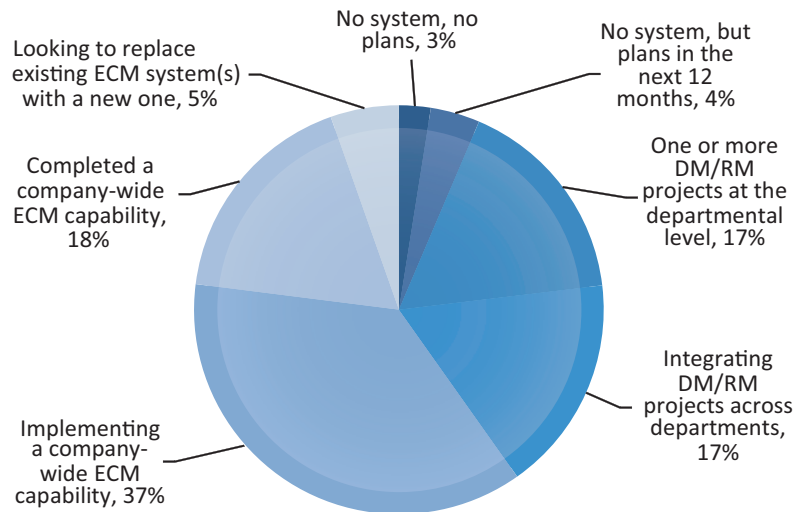
Create an Integrated Information Ecosystem

In order to meet business and compliance requirements, as well as to effectively serve the needs of customers, organizations must enable fast access to accurate and up-to-date information. Users need to be able to quickly locate the correct version of a document, or collections of documents, without wasting time searching through disconnected business systems and repositories. AIIM Research shows that having two or three systems and repositories is common (26%), while 43% cite four or more can be found in the largest organizations[1].

In an ideal ECM environment, information is not tethered to a specific location - it resides within, and can be accessed and synced between, various systems and devices without duplication of content. As a result, information assets are freed from the confines of applications, platforms and information silos. Regardless of where it resides, users can quickly and easily find and use the information they need to help them make more informed decisions and provide greater value to customers. The ultimate goal is to create an integrated information ecosystem where all business systems are interconnected in a way that users can capture, manage and access the information they need, when they need it.

Once core business systems are integrated with an ECM platform, users benefit from "content in context" that provides a personalized 360 degree view of other information related to what they are working on from a simple unified platform. This includes information that may be relevant to the employee's task at hand. For example, a salesperson finalizing a customer proposal conducts a search in the ECM system to locate the most current version of the proposal document. However, since the ECM system is integrated with the CRM application, the salesperson learns during this search that there is an open "issue resolution" request for the customer, and as a result, decides to wait to send the proposal until the issue is resolved.

Figure 4. How would you best characterize your organization's experience with document management (DM), Records Management (RM) and Enterprise Content Management (ECM)? [1]

Looking to replace existing ECM system(s) with a new one, 5%

No system, no plans, 3%

No system, but plans in the next 12 months, 4%

Completed a company-wide ECM capability, 18%

One or more DM/RM projects at the departmental level, 17%

Integrating DM/RM projects across departments, 17%

Implementing a company-wide ECM capability, 37%

While it is beneficial to integrate the back-end systems for information exchange, from the users' perspective, it is irrelevant as to where the information came from, as long as it can be found when it is needed. This can be accomplished by leveraging metadata to create relationships between information objects in various business systems, which then enable more intelligent and accurate search capabilities that span the enterprise and relevant business applications.

Conclusions and Recommendations

Today's business professionals expect their companies to provide simple and effective ways for them to store, access, share and collaborate on content, and if this isn't provided, they'll figure out a way to do it on their own. Furthermore, not only are users looking for easier ways to access the information they need, there is a growing expectation that their information management platform will provide recommendations for additional information that may be relevant to them.

This user expectation of a simple to use, single point of access interface, translates into a need for contextual information management to include not only unstructured content (i.e., documents, images, videos), but also access to structured data housed within the LOB applications such as customers, contacts, equipment and other information assets relevant to what the user is looking for.

Recommendations

As an information management professional or business leader, you should consider the following:

- Simplify Content Collaboration — Internally and Externally

- Map the types of collaborative content, processes, players and existing technology solutions currently in place for managing your information ecosystem

- Identify the source and use of content requiring collaboration with internal and external entities

- Document the business requirements and assess technologies to meet the need

- Empower your remote workforce

- Include internal and external users (i.e., partners, suppliers, customers) in your mobile ECM strategy

- Look for ECM solutions with device agnostic mobile apps

- Provide a simple mobile interface without loss of key functionality

- Create an integrated information ecosystem

- Connect ECM and existing business systems across the enterprise

- Eliminate information silos by enabling users to access any information asset from any business system

- Deliver a 360 degree view of content and other information, allowing the user to get to the information they need, regardless of where they start

Reference:

1 AIIM Industry Watch titled "ECM at the Crossroads - key strategy choices for universal content management"

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M-Files enterprise information management solutions (EIM) improve and simplify how businesses manage documents and other information in order to become more productive, more efficient and stay compliant. M-Files eliminates information silos and provides quick and easy access to the right content from any core business system and device. M-Files achieves higher levels of user adoption resulting in faster ROI with a uniquely intuitive approach based on managing information by "what" it is versus "where" it's stored. With flexible on-premises, cloud and hybrid deployment options, M-Files reduces demands on IT by enabling those closest to the business need to access and control content based on their requirements.

Thousands of organizations in over 100 countries use M-Files as a single platform for managing their critical business information, including companies such as SAS, Elekta and EADS.

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AIIM
1100 Wayne Avenue, Suite 1100
Silver Spring, MD 20910
+1 301 587 8202
www.aiim.org

AIIM Europe
The IT Centre, Lowesmoor Wharf
Worcester, WR1 2RR, UK
+44 (0)1905 727600
www.aiim.eu