



WHITE PAPER

'CONTENT CHAOS': WHY DOCUMENT
MANAGEMENT CAN'T FIX IT

OCTOBER 2010



Microsoft
GOLD CERTIFIED
Partner

'CONTENT CHAOS': WHY DOCUMENT MANAGEMENT CAN'T FIX IT

The Ovum/Butler Group says that, in organisations that don't 'have a structured approach to document creation and management, the resulting lack of control can cause significant business inefficiency and exposure to compliance or disclosure risk.'¹

Many organisations have bought solutions like ECM (Enterprise Content Management) systems to try to gain control of their rapidly-growing information. Many have found that ECM systems alone can't fix the resulting 'Content Chaos', because they weren't designed to address document creation.

In this White Paper, we summarise industry analysts' comments and show how:

- 'Content Chaos' starts with document creation
- Intelligent document creation can lighten the burden for IT
- Business users and customers can drive the process themselves
- Integration and automation can ensure consistency for control and compliance
- Information silos can be removed and existing systems leveraged and
- Fixing chaos has spinoffs for the whole organisation.

Chaos & ECM

As the amount of stored data grows, the need for content control grows at the same pace. 'Content Chaos' is a common problem, cited by six out of ten CIOs surveyed by AIIM in 2010 as the reason for implementing an Enterprise Content Management system.²

Another key reason was the potential efficiency gains. The Global Financial Crisis has added more reasons for organisations to optimise their business processes and compliance positions. Gartner analyst Toby Bell estimates that 'approximately 80 per cent of enterprise information is unstructured content, 90 per cent of which is unmanaged,'³ so there seems to be plenty of scope to improve.

Bell makes the point that 'ECM is a destination ... a business imperative. There are technologies closely related to that imperative but basically, it's policies, procedures, and automating whatever possible.' Bell also forecasts that organisations will organise their content so they can present the 'right information at the right time to the right audience in the right format for the right reason.'⁴

Return on investment (ROI) remains the only open issue, according to Forrester Research who found that 'A majority of firms can't prove ROI, likely making approval for ECM investments more difficult.'⁵

Chaos starts with creation

Organisations in customer-facing industries like banking, insurance, utilities, telecommunications, government or manufacturing need to produce documents for a diverse customer base. While ECM platforms are good at managing the document lifecycle, they weren't designed to manage the creation of mass or *ad hoc* documents (created for a specific purpose) that contain common elements. Another factor is complexity: ECM systems tend to result in

¹ Ovum/Butler Group Intelledox Technical Audit 27 Jan 2010 <http://www.intelledox.com/NewsMedia/Press-Releases.aspx?articleId=155>

² Miles, D, State of the ECM Industry, (2010), AIIM, www.aiim.org/research

³ <http://www.destinationcrm.com/Articles/CRM-News/Daily-News/5-in-the-Lead-in-Gartner-Magic-Quadrant-for-Enterprise-Content-Management--60091.aspx>

⁴ ibid

⁵ http://www.forrester.com/rb/Research/collaboration%2C_search%2C_and_compliance_drive_2010_ecm/g/id/55706/t/2

complex deployments, according to Gartner Research: 'Content management systems, regardless of the size of the organisation, have the potential to experience a myriad of implementation problems.'⁶

Some ECMs can't find and retrieve locally-stored documents or those on departmental drives for which the user has no access. Also, searches without exact titles can return hundreds of results, making it hard for users to find the one they seek. Even in successful ECM deployments, documents will be difficult to locate if consistent document-naming conventions are not in place. As a result, users will recreate documents they don't know about or can't locate.

Furthermore, if users do find similar documents, they will often copy and paste portions of them into the new ones. This can have serious consequences if personal details aren't changed or relevant terms or legal clauses are omitted. Gartner flagged this some time ago, saying the consequences of failing to implement an automated document assembly system are high.⁷

Other business users create their own templates using macros that may not meet corporate branding standards. As a result, every time new software upgrades are implemented, these macro-driven templates have to be recreated, often by the IT department. In large organisations with multiple customers and brands, this can be a constant drain on valuable IT resources.

The missing link in resolving content chaos is document creation capability that can manage bulk and *ad hoc* communications, by finding the common elements and incorporating them according to rules. The most advanced systems here tend to be from niche vendors, but some of the larger vendors are now adding similar functionality to their ECM products, so they can offer end-to-end solutions. However, Forrester Research analyst Stephen Powers observes that, 'While enterprises desire an end-to-end ECM suite that covers all content needs, in actuality they continue to have multiple ECM point products and/or suites in place.'⁸

Order from automation

Regardless of whether outbound communications are offers, invoices, contracts, agreements or periodic documents, they will contain some elements standard to the organisation, so developing templates is an obvious step. The common missing ingredient is a document creation facility which ensures that outward-facing documents:

- Contain the standard elements the organisation has defined
- Are based on pre-defined templates for text, layout and branding
- Conform to a consistent document-naming convention and
- Comply with the regulations that govern the business issuing them.

Document creation and assembly is the first, vital step in the document lifecycle. If documents are created according to a set of rules, document management becomes much easier, from indexing to structuring, versioning, storing and retrieving. Automation is vital here too; without automating the document creation process, taming content chaos will be difficult because:

- Keeping templates up-to-date and ensuring everyone is using them is almost impossible
- Repeated use of templates by multiple users creates untraceable changes and inaccuracies within documents
- Document storage and classification are rarely optimal, and retrieval issues are common and costly; usually some files will be lost and
- Ensuring that documents reflect all legal requirements and include recent changes is time-consuming and prone to human error.

⁶ Gartner Hype Cycle for Content Management, 2009 <http://www.gartner.com/DisplayDocument?id=1091512>

⁷ Gartner, MarketScope for Automated Document Factory 2.0 Software <http://www.gartner.com/DisplayDocument?id=824818>

⁸ http://www.forrester.com/rb/Research/collaboration%2C_search%2C_and_compliance_drive_2010_ecm/q/id/55706/t/2

Document assembly systems can start to restore order by filling in the correct document variables based on transaction data, and do it automatically every time. In addition, by answering wizard-driven questions, users can provide the document assembly software with document-specific inputs. This information can be combined with existing company and customer data to populate the final content. The resulting document can be created by the software and delivered via the preferred channel – be it web forms, email, PDF, printer or print queue.

Users to drive creation

Document generation solutions are designed to create and deliver personalised customer communications. If users, rather than IT specialists, are able to use them to create professional quality communications, the organisation can dramatically improve its response times and productivity - and ease some of the burden on IT resources.

So that business users can write their own content within controlled parameters, approved templates need to be created and used. Document template migration should also be supported so that templates are 'future-proofed' against software upgrades. This will eliminate the common macro-based approach that can be compromised when software is upgraded.

Using document assembly systems, users can publish templates, populate them with approved content and apply business rules to create orderly and compliant documents. Users can centralise the automation and generation of documents and, where there are no scripting requirements, avoid calling on the IT department for help. This frees IT staff to deal with the data management aspects of high volume communications.

Documents commonly created by users range from license correspondence and employment contracts, to complaints handling, special offers and user manuals. With an intelligent *document assembly system*, these can be dynamically created on demand and sent to individual business customers, or mailed out in bulk just like statements.

These are some of the key factors for successful bulk document creation:

- Document generation must be tightly and centrally managed to avoid user errors, and ensure conformity with corporate standards and compliance requirements
- The document creation system must be easy for non-IT users to drive, and should ideally be wizard-driven
- The system must integrate easily with related business systems and databases, to realise the full potential for business process optimisation and
- Document creation must extend beyond static documents to dynamic online forms.

Customers can drive too

Forrester Research talks about DOCCM (Document Output for Customer Communications Management) 'improving the customer experience'⁹. The underlying technology is *context-aware computing*, which Gartner Research calls a disruptive technology, a 'real game changer'.¹⁰ It forecasts that 'emerging context-enriched services will use location, presence, social attributes, and other environmental information to anticipate an end user's immediate needs, offering more-sophisticated, situation-aware and usable functions.'¹¹

Using *context-aware systems*, customer-facing online forms can be accessed by customers via the organisation's website, enabling customers to 'serve themselves' highly personalised content. These systems handle the complex decision trees associated with QA (Question and Answer) logic processing, while managing the automation and customisation of complex business rules.

The same applies for inward-facing forms, such as detailed documents that financial advisors create for each client. Inputs from each client can be used to create a personalised document, specific to each client's proposal.

⁹ The Forrester Wave™: Document Output For Customer Communications Management, Q2 2009

¹⁰ Ibid

¹¹ <http://www.gartner.com/it/page.jsp?id=1190313>

The ability to use *context-aware* web forms adds a whole new dimension, allowing customer or employees to create online content dynamically. It also makes a compelling case for improved customer interaction, greater responsiveness and increased staff productivity. This 'self-service' functionality is a significant advance, especially for large organisations with thousands of customers, to engage with thousands of customers, easily, cost-effectively and with the same, fewer or less specialised staff.

Removing information silos

Integration with business applications like CRM, BPM and ECM systems is the key to maximising the return from information management systems. Popular applications like Microsoft SharePoint, Compuware ChangePoint, Siebel/Oracle CRM, and HP TRIM Document Management all provide some degree of information lifecycle management. When integrated with intelligent document creation, it becomes easy to collect data from a range of business systems and merge it with information entered by users, customers or employees, to create and manage individual communications, dynamically. More than this, integration ensures automated data flows and end-to-end information management, with significant economy, accuracy and productivity gains.

The impact of integration and consolidation on ROI was made clear by Forrester Research: 'Evaluating the ROI of correspondence management proves that organisations can realise a return within a year by optimising content production, consolidating vendors and systems, and reducing paper usage.'¹²

A real world example is CASA, Australia's Civil Aviation Safety Authority, which is currently improving its internal organisational productivity and efficiency. According to Simon Denby, CASA's CIO, their intelligent, integrated 'Enterprise class' document creation and assembly solution 'fully leverages our existing infrastructure. It allows our divisions to own and manage document template design and delivery, keeping down costs, and increasing the speed of implementation.'¹³

By breaking down the rigid data silos common in large organisations, the document creation system can enhance the usefulness of existing ECM and other systems, increasing ROI from past IT investments. Measurable benefits can be gained elsewhere too: increased productivity of business users, reduced workload for IT and business users, reduced human error and increased control and compliance, especially if templates and documents are maintained in a single repository. The spinoffs from fixing content chaos are numerous and spread well beyond marketing and communications, ensuring that investment in document creation systems can pay dividends across the enterprise.

* * *

Author

Phillip Williamson,
 CEO, Intelledox



Phillip Williamson is a software entrepreneur with a talent for seeing emerging trends in technology, and extensive experience in the IT industry in Hong Kong and South-East Asia. He founded bespoke software development company DPM Consulting which created [Capability LMS](#), learning management software used by hundreds of thousands information workers around the world. Phillip now runs Intelledox, a leader in the emerging market of automated document creation & assembly. Phillip has a Bachelor of Science (Hons) degree from the Australian National University.

¹² http://www.forrester.com/rb/Research/roi_of_correspondence_management/q/id/46592/t/2?src=46935pdf

¹³ <file:///C:/Documents%20and%20Settings/Kim/Desktop/INTELLEDOX/White%20Paper%202/Intelledox%20Supercharges%20Siebel%20-%20Computerworld.htm>