



DIGITAL TRANSFORMATION IN ACTION

A COMPREHENSIVE PREVIEW OF #AIIM16



WHY SHOULD YOU CARE ABOUT DIGITAL TRANSFORMATION?

CONSIDER THE FOLLOWING:

“THE SPEED OF CURRENT BREAKTHROUGHS HAS NO HISTORICAL PRECEDENT.”
KLAUS SCHWAB, WORLD ECONOMIC FORUM, 2016

“FOR THE FIRST TIME IN HISTORY, THE WORLD'S LEADING EXPERTS ON ACCELERATING TECHNOLOGY ARE CONSISTENTLY FINDING THEMSELVES TOO CONSERVATIVE IN THEIR PREDICTIONS...”
STEVEN KOTLER

“UBER, THE WORLD'S LARGEST TAXI COMPANY, OWNS NO VEHICLES. FACEBOOK, THE WORLD'S MOST POPULAR MEDIA OWNER, CREATES NO CONTENT. ALIBABA, THE MOST VALUABLE RETAILER, HAS NO INVENTORY. AND AIRBNB, THE WORLD'S LARGEST ACCOMMODATION PROVIDER, OWNS NO REAL ESTATE. SOMETHING INTERESTING IS HAPPENING.”
TOM GOODWIN, HAVAS MEDIA, IN TECHCRUCH

WHAT THE HECK IS GOING ON AND WHAT DOES IT HAVE TO DO WITH INFORMATION PROFESSIONALS?

Simply speaking, according to the World Economic Forum, we are on the cusp of the next industrial revolution, one that is combining digital and physical systems to create radically new value propositions – and in the process, disrupting many existing businesses.

How effectively an organization manages and recombines its information assets to create value is at the center of this revolution. Flexible, agile and responsive information flows are the central nervous system of the modern organization. In many organizations, these systems are short-circuiting, and drifting into chaos, unable to keep up with the escalating demands created by consumerization, cloud and mobile, and the internet of things.

CENTRAL TO ADDRESSING THESE CHALLENGES ARE TWO REALIZATIONS:

- 1 Information is now your organization's most important asset
- 2 You need the skills to manage it.

DEPENDING ON YOUR ROLE IN YOUR ORGANIZATION, YOUR DIGITAL TRANSFORMATION CHALLENGES WILL FALL INTO ONE OF THE FOLLOWING CATEGORIES:

BUSINESS CHALLENGE

AUTOMATION: How do I deliver solutions more quickly using mobile-first and lo- and low-code approaches?

SECURITY/GOVERNANCE: How do I govern, value, manage, secure, optimize and protect my information assets, wherever they exist (cloud, on-premise, or some hybrid)?

ANALYTICS/INSIGHT: How do I digest massive amounts of new data, apply structure where it doesn't exist, and use that structure to put data and content into action?

WHO SHOULD CARE

Line of business executives, web and mobile app developers, imaging and content specialists, business analysts, finance, HR, and operations executives, customer experience execs

Records managers, information architects, E-Discovery, IT legal professionals, digital archivists

Marketers, line of business executives, information and data scientists, knowledge managers, information curators, customer experience execs

THIS IS WHAT AIIM – AND MORE SPECIFICALLY AIIM16 – ARE ALL ABOUT.



ERIK QUALMAN

AUTHOR OF
WHAT HAPPENS IN VEGAS STAYS ON YOUTUBE

Erik Qualman and Jacob Morgan will headline the keynoters at AIIM16. A stellar cast of speakers – many of whom contributed to this e-book – will help you build a roadmap to address your Automation, Security/Governance, or Analytics problems.



JACOB MORGAN

AUTHOR OF
THE FUTURE OF WORK

Here's a short sample:

AUTOMATION

Jim Sibernaller, Loyola University Chicago

Demystifying Successful ECM Deployments – “What role do soft and hard metrics play in garnering support from decision makers and budgetary planners?”

Steve Stone, United Bank

Automating Image Capture for Fun and Profit – “How do you meet federal compliance requirements, streamline operations, reduce costs, and do it all in less than a year?”

Hubert Dorsainvil, A+E Networks

The E3 Method for Collaboration: Engagement, Expectation, and Enthusiasm – “How do you cooperate with customers and employees from the very early stages of a project to build engagement?”

Danielle Galmore, Steelcase

What Lessons Can We Learn About Online Collaboration – “How should you rethink the ways in which employees interact and collaborate?”

SECURITY/GOVERNANCE

Charley Barth, Cummins

Where to Begin? – “How do you get started with automating content governance, and do it at a Fortune 500 scale?”

Maria Luisa Di Biagio, European Central Bank

Implementing Automated Retention at the European Central Bank – “How can you automate information governance at large scale?”

Matt McClelland, Blue Cross/Blue Shield

Success Through Pragmatism: Moving from Hell to Purgatory is a Win -- “How do you set realistic expectations, and remain flexible in the face of shifting corporate priorities?”

Michyle LaPedis, Cisco Systems

Content Whack-a-Mole: Keeping Up Compliance Across Multiple Repositories – “How do you deal with the new tools that seem to be popping up in your organization every day?”

ANALYTICS/INSIGHT

Russ Stalters, BP

Information Management: The Technology Doesn't Matter – “How should you manage information as a business asset and deliver on the promise of discovering new insights and creating value from the information and data.”

Tony Peleska, Minnesota Finance and Housing

Data Analytics - The Foundation and Future – “How can organizations address the merger of data and content and use these insights to drive value?”

Kurt Neumann, Prime Therapeutics

Technology Pioneers, Explorers & Radicals, Oh My! – “How does generational variation in the workforce impact the adoption of systems?”

So whether or not we see you in New Orleans – we hope so! -- what are the rules that should govern your Digital Transformation initiative? How can you help your organization think strategically about this challenge rather than just reacting to it?

What skills do you – and your organization – need to have in order to turn disruption into opportunity?
Let's take a look, fueled by insights from 29 experts, many of whom will be presenting at AIIM16, April 26-28 in New Orleans: Digital Transformation IN ACTION: 21 Things You Need to Know.

DIGITAL TRANSFORMATION IN ACTION

21 THINGS YOU NEED TO KNOW

1. CREATING A TRANSFORMATION STRATEGY

- ① Know where the puck is going.
- ② Think business, not fashion.
- ③ Have a Disruption war chest!
- ④ It's a journey, not a destination.
- ⑤ Keep risk in perspective.
- ⑥ One size does not fit all.
- ⑦ Per Yoda, "Do or do not, there is no try."

2. PREPARING FOR ACTION

- ⑧ Not all customers will immediately love the idea of disruptive change.
- ⑨ Disruption is not just an external customer affair; the way work itself is being done is being revolutionized.
- ⑩ Find out what your people are REALLY doing BEFORE you try to change it.
- ⑪ If you can't measure it - don't do it.
- ⑫ Make digital transformation pay for itself.
- ⑬ Plan that when you fail (and you will), you will fail fast!

3. IMPLEMENTING YOUR TRANSFORMATION PLAN

- ⑭ Mom was right. Before you do anything, clean your room!
- ⑮ A unified information strategy is not a luxury.
- ⑯ Focus, focus, focus. And then focus some more.
- ⑰ Remember that simple is hard.
- ⑱ Find a trusted partner that will listen and is excited about your journey.
- ⑲ Leverage the technology you already use.
- ⑳ Think BIG, start small, grow steadily.
- ㉑ The last rule – Oh yeah, after all this is AIIM. You didn't think we would forget, did you? **DO SOMETHING ABOUT THE PAPER!**

CREATING A TRANSFORMATION STRATEGY

RULE #1 – KNOW WHERE THE PUCK IS GOING.

Danielle Galmore, Steelcase: “Technology moves faster than companies, as a rule. Be cognizant of what is happening and ready to adjust if new technology or new needs arise. Your first project may have to pivot if too much time has elapsed and relevancy is lowered.”

Ian Story, IBM: “You’re going to need to change your own mindset and figure out ways to embrace rapid change. Chances are that you’re not ready for digital disruption - people like things to stay the same. No surprises there - but to succeed, you’re going to need to change your mindset. Start learning about new technology, dedicate some free time every week to playing with the latest gadgets and apps and web startups, find something you’re passionate about and start using it at work and share with your colleagues.”

RULE #2 – THINK BUSINESS, NOT FASHION.

Paul Engel, VeBridge: “Not every aspect of digital disruption impacts you or your business. Spend your money strategically -- and surgically. Don’t run after every new bright and shiny object out there just because others are doing so. Be thoughtful. Ask the question, ‘Can I leverage this to my company’s advantage, or is this just a new bell or whistle?’”

Duff Johnson, PDF Association: “Many new technologies come and go. Pay attention to those which have proven staying-power and a broad eco-system of developers.”

RULE #3 – HAVE A DISRUPTION WAR CHEST!

Ian Story, IBM: “If you don’t have the financial strength to weather changes in your business, you need to start preparing now, while things are still good -- build that war chest or rainy day fund. What are you going to do when an upstart competitor comes in and steals half of your business overnight? What are you going to do when you have to invent brand new products and your existing stuff stops selling? Are there things you’re spending money on that you can divert to modernization (old technology, broken processes)? You need to prepare for this NOW, running at razor thin margins is a dangerous way to run in periods of rapid change.”

RULE #4 – IT'S A JOURNEY, NOT A DESTINATION.

Chris McLaughlin, EMC: "True digital transformation is about instilling a digital mindset in your organization. A truly digital organization embraces change and recognizes that new technologies, new products and services, and new ways of servicing customers are simply opportunities: opportunities to differentiate, to take market share and to outperform competitors. They also accept that digitization is a constantly moving target and that new technologies and new market entrants with new business models will continually create disruption and competitive pressure. So, instead of focusing on digital transformation as a one-time event, invest in building a culture and a mindset that embraces change and constantly seeks out new ways of doing business."

Charley Barth, Cummins: "Understand you will never reach nirvana if you work for a large company. Always strive for perfection but understand and accept you will never get close to it. Remembering this will help you sleep at night. As humans we are incapable of figuring this out on a large scale."

Andrea Chiappe, Systemware: "Do not look at systems that manage information assets as a 'set it and forget it' project. Ensure you have the measurements and teams in place to reevaluate the systems on a planned timeline. In terms of your information landscape, ask yourself -- Is it current? Is it strategic? Is it secure? Is it performing?"

RULE #5 – KEEP RISK IN PERSPECTIVE.

Neale Stidolph, Lockheed-Martin: "Chaos cannot be controlled, information wants to be free and people don't do what they are told. These are universal truths! What we can do is explain to everyone that information has issues of sensitivity, risk, regulation and many other factors. We must all be thoughtful in our treatment of information. We cannot police this whole ecosystem but we can make people cautious and mindful about it."

Chris Walker, PHIGs IMC, Inc.: "If your entire approach to managing information is based on minimizing risk (litigation, leaks) you are never going to be able to focus on leveraging the VALUE of your information ASSETS. Change, disruption, transformation, and innovation require that things get messy and people get upset. Don't worry about it. Find the internal champions and sponsors that'll have your back. Maintaining the status quo hasn't worked up until now, what makes anyone think it's a reasonable path forward?"

RULE #6 – ONE SIZE DOES NOT FIT ALL.

Alan Pelz-Sharpe, Digital Clarity: "Just because technology X works well for Ford or GE does not mean it will work for you. Often times simple, stripped back technology will be a better fit for your needs than broad, complex and expensive technology 'suites.'"

Yulia Kaurova, 4Point: "Don't be limited by knowledge, trends and transformations most related to your industry. Do you remember that hydrojet invention was inspired by propulsion systems related to marine creatures like octopus or squid? To see the big picture is always beneficial. Sometimes facts or challenges related to other industries and thinking out of the box can provide you brilliant ideas of how to explore them in your own work."

Neale Stidolph, Lockheed-Martin: "Information is not usually generic, it has particular relevance and meaning to different sectors, be they government, financial, or industrial. Seek out others who work with similar classes of information, find out whether there are standards or regulations in your sector. If they don't exist, start to collaborate with others to build a shared classification for your sector."

Duff Johnson, PDF Association: "Demand the features you need! Most software vendors don't get the feedback they need to help them make more useful software. Customers suffer in silence, pay consultants to fill the gap, or simply buy yet another product. Invest some time in describing -- in detail and in a technically-accurate manner -- what it is that you need. You might be amazed at the response."

Alan Pelz-Sharpe, Digital Clarity Group: "Don't blame the technology."

The fact of the matter is that almost all IT hardware and software today works efficiently and does what the package describes. Yet the majority of IT projects continue to fail or fall short of expectations. Choosing the right team and managing your project realistically against clear timelines, budgets, needs and expectations determines whether your project will be a success or fall with the rest."

RULE #7 – PER YODA, "DO OR DO NOT, THERE IS NO TRY."

Andrea Chiappe, Systemware: "Remember that in the end, the evolution of ECM isn't about how we share information now. It's about brokering that information in the future. We have to reach outside our traditional information spheres, and re-evaluate our existing processes and solutions. Hanging on to an aging, bandaged ECM solution can limit the future success of your business strategies. Sometimes we have to let go of our past experiences and embrace the future if we're to fulfill our information destinies."

Chris Walker, PHIGs IMC Inc.: "You want your people to innovate, transform, and disrupt, but you're still relying on out-moded and out-dated managerial structures. Stop. Create an atmosphere that encourages people to go out on a limb and try something new. Give them the freedom to try, but define some reasonable boundaries for them."

Danielle Galmore, Steelcase: "Utilize change agents to sell your story more broadly. Every company has groups or departments that like to experiment and try new things. Tap into that natural tendency to get receptive test groups to work out the kinks and give honest feedback."

PREPARING FOR ACTION

RULE #8 – NOT ALL CUSTOMERS WILL IMMEDIATELY LOVE THE IDEA OF DISRUPTIVE CHANGE.

Ian Story, IBM: "Many customers and clients still like to get their paper statements -- this costs you money. Many customers and clients still like going into branches instead of working with you online – this costs you money. Many customers still like calling your call centers, instead of using other channels like online chat and email –this costs you money. You need to educate your customers and show them how they can get better service and life can be more convenient by embracing disruptive technologies, and start to encourage them to use these new ways to engage."

Steve Stone, United Bank: "In a high volume Lockbox environment, we were challenged to give customers a reason to move from traditional paper copies to images. We could have incented them with price, of course, but we wanted our customers to want to move. The answer seems obvious in retrospect, but we had to make the new system better than the system it replaced. In this case, that meant full color, high resolution images from end to end to replace black and white photo copies; on-line search capabilities to replace file cabinets; transmissions to replace overnight packages. In the final analysis, customers asked to be moved and paid more for the image-based service because the total value proposition was so much better."

RULE #9 – DISRUPTION IS NOT JUST AN EXTERNAL CUSTOMER AFFAIR; THE WAY WORK ITSELF IS BEING DONE IS BEING REVOLUTIONIZED.

Patrick McGrath, EMC: "Digital transformation impacts all areas of the organization, including how work gets done. Better enabling knowledge workers represents one of the single largest opportunities for business transformation in the digital era. Knowledge workers represent 27% of employment costs and many estimate that more than 50% of their time is spent inefficiently. Within the next 5 years, we will see a significant move toward the use of temporary and independent workers. Disruptors who embrace this approach will win in the digital economy."

Alan Pelz-Sharpe, Digital Clarity Group: "Many IT projects focus in on getting senior executive buy-in and requirements are gathered from department managers. From the get go you must involve those that will be actually using the technology on a daily basis. Not doing so is one of the most common reasons for project failures, either because incomplete requirements were gathered or because the users of the technology that can (sometimes deliberately) ensure their failure."

Ian Story, IBM: "Chances are that the people on your team and your colleagues -- and your company as a whole -- are not ready for digital disruption. People like things to stay the same, or at best they will grudgingly change – but not like it at first."

RULE #10 - FIND OUT WHAT YOUR PEOPLE ARE REALLY DOING BEFORE YOU TRY TO CHANGE IT.

Jim Ongena, Ordina Belgium: "In every company, people are moving ahead at a pace the management probably isn't able to follow. Habits formed over many years do not necessarily work in the new environment. Find out more about your people, by talking with them. More importantly, see what they are actually doing by observing them in an indirect manner."

Brian Tuemmler, Nuix: "Information systems that are transparent can provide valuable insight into how your people are actually using information -- hot topics, collaborative functions, taxonomy elements, expert content creators, ROI details, and growth rates can all be based on the hard evidence in your existing content systems. Don't just automate the madness, but leverage the knowledge that is in that mess effectively."

RULE #11 - IF YOU CAN'T MEASURE IT - DON'T DO IT.

Alan Pelz-Sharpe, Digital Clarity Goup: "'It's too difficult to measure' is a commonly heard excuse in business. But in the world of content and information management, if you can't measure a business benefit you likely shouldn't be doing it. Whether it be processing more in less time at less cost, gaining actionable insights or attracting more customers, work out in advance how you can track and measure whether your efforts are delivering to expectations."

Kevin Parker, NEOSTEK : "Use an IM maturity model and assessment (like the one from MIKE2.0 or NARA's RIM Maturity Model). Involve a range of stakeholders that includes both leadership and staff. The assessments should be honest. The initial assessment gives you a current state picture and helps to identify the major areas that need prioritized improvement. Each subsequent assessment should be done as improvement iteration reviews. These provide real progress measurement."

Jodi Schecter, eSignLive: "Measure outcomes! Be sure to note baseline activities both before and after your digitization projects. Track time saved, cost savings, speed-to-market, customer adoption, and employee engagement."

RULE #12 - MAKE DIGITAL TRANSFORMATION PAY FOR ITSELF.

Chris McLaughlin, EMC: "For most companies that weren't born digital, the tough reality is that as time goes on they have more legacy systems to sustain and, each year, more and more of their budget is consumed in simply operating existing infrastructure. For many companies, this number may be as high as 85% or more of their IT budget. IT leaders are being asked to provide many of the tools necessary for digital transformation, but are struggling to pay for them. So, to begin, self-fund IT transformation by seeking out proven solutions to take cost out of your legacy infrastructure and, along the way, also look to unlock critical information that may be trapped in these siloed systems."

RULE #13 – PLAN THAT WHEN YOU FAIL (AND YOU WILL), YOU WILL FAIL FAST!

Jordan Jones, Cisco: "Don't worry about getting it right the first time; worry about getting something in place that can be evaluated. Even if it is a 'failure' you will learn more than you would in months of 'requirements' meetings. Learn from your 'failures,' and iterate. You will get something workable faster than you would have otherwise, and your ultimate product will involve less rework and more quick corrections."

Danielle Galmore, Steelcase: "You have a hypothesis or desired state, so run a learning cycle. It is similar to a failing fast mentality, but in a positive way that frees you from the word failure. It also allows you to run iterations quickly as you learn, adjust and learn more."

Chris Walker, PHIGs IMC Inc.: "Start something. Anything. Sitting around navel gazing is going to result in you being crushed. Pick something small, easy, and safe, but with tangible benefits and get going."

IMPLEMENTING YOUR TRANSFORMATION PLAN

RULE #14 – MOM WAS RIGHT. BEFORE YOU DO ANYTHING, CLEAN YOUR ROOM!

Neale Stidolph, Lockheed-Martin: "Unstructured information tends to multiply in the dark. Ensure you have an effective way of finding and then tackling information that is Redundant, Obsolete or Trivial (ROT). You will need a policy and some rules on classification and retention, using a smart tool that can sift through large volumes. Being able to automate the tidy-up is highly desirable, preserving audit trails as well."

Tim Osman, OPEX: "Any good remodel takes an accounting of the entire space and contents that currently exist within it. There will be 'furnishings' that you will want to re-use. Some items may require a simple touch up or perhaps may need to be tossed in the dumpster altogether. You may even find a gem or two, lost long ago, that may impact your remodel in a significant way. Envisioning the future, fresh and new, starts with a good old-fashioned cleaning."

RULE #15 – A UNIFIED INFORMATION STRATEGY IS NOT A LUXURY.

Kevin Parker, NEOSTEK: "Develop and mature your information strategy to include all data, documents, content, knowledge, and records from every major process regardless of format or technology. Build this into an information architecture that works for your business. Make it agile and govern it. Technology disruptions will continue. A unified information strategy, architecture, and governance will guide the organization through these challenges and help turn them into advantages for the organization. This will help build a culture of transformation and information management."

Glenn Gibson, OnBase by Hyland: "No one said building an information strategy would be easy. This is why we are seeing emerging roles such as 'Chief Data Officer' and very focused 'Chief Information Officer' positions. This needs oversight because it's more about strategy than about any individual technology. Ten or fifteen years ago, organizations were looking for a single, large technology buy as the answer. The promise of ECM was seen as a Lord of the Rings 'one repository to rule them all.'" This dream never really materialized for many organizations because it demanded a forced standardization of content types, taxonomies and work styles across the organizations and was, ultimately, unrealistic. Rather than starting with the technology and trying to making everything fit, the way forward is to start with the strategy and then invest in the right technologies to bring this to life. When the technologies chosen truly align with the goals of a 'unified architecture,' that's when the magic happens."

RULE #16 – FOCUS, FOCUS, FOCUS. AND THEN FOCUS SOME MORE.

Charley Barth, Cummins: “If you are an ECM team of one or two people, you will not be able to move mountains by yourself. Do not over promise and oversell what you are capable of. Find a project that you and your staff can manage and make sure it is acceptable to your manager.”

Valerie Gierman, FileFacets: “Setting reasonable targets is key and, to go a step further, education helps to engage content owners and thereby extend your team. By identifying subject matter experts from each business unit, an ECM team can extend its reach. Self-serve projects can be embarked upon in which the ECM team provides direction and training and content owners take responsibility for the organization and attribution of their own content, preparing for migration into the ECM. Many hands make light work!”

Chris Walker, PHIGs IMC, Inc.: “Don't try to change the world. Trying to change the entire organization is going to take time and resources, so don't try to do it all at once. Start with something that you know isn't working optimally and change that. Then move on to the next thing, and the next thing, and the next thing...”

Jodi Schecter, eSignLive: “Digital Transformation can mean different things to different organizations. For your own, begin with a single process – perhaps one that is not mission-critical. With success, you can then scale to other departments or workflows within your operation.

Don Field, Ephesoft: “There is a tendency to attack the solution from all sides but business owners won't see solid results for some time. Best to start with the biggest problem area for the users and then move in a phase 2,3,4... to other parts. Early success will convince management that the project is on the right track.”

RULE #17 – REMEMBER THAT SIMPLE IS HARD.

Andrea Chiappe, Systemware, Inc.: “Every person who interacts with your information systems has a very different perspective of what makes it good. Systems should not dictate the use of your information, rather they should help you realize and harness the value of information assets. Simple design is hard, it requires forethought and deep analysis of behaviors and trends of ALL the factors.”

Greg Milliken, M-Files: “As the popularity of file sharing apps has grown, companies must be able to balance security and data protection against employee needs for a simple solution for sharing documents and collaborating with others outside of their organization.”

Lea Beeken, Edmonton Public Schools: “Figure out how Google Apps fits into your strategy. Use ECM to ‘rescue’ and preserve the content that is of value to the organization, while using Google apps to collaborate and create content easily.

RULE #18 – FIND A TRUSTED PARTNER THAT WILL LISTEN AND IS EXCITED ABOUT YOUR JOURNEY.

Charley Barth, Cummins: “There are hundreds of contractors who can help you on your ECM journey. Really get to know the core values of the companies you are interviewing and go with companies that want you to be successful. Too many of these vendors only look at you as a temporary meal ticket and want to squeeze as much funding out of you as possible. Before committing, get a clear read on the character of the company and the quality of the employees they want to put on your engagement.”

Paul Engel, VeBridge: “Seek Trusted Advisors. This may be your first rodeo, but there are plenty of peers and business associates who have ridden the bucking bronco of disruption already! And don't be afraid to include input from vendors in this space. If you balance what they are saying with what you are collecting from trusted associates, you will be able to eliminate the self-servers and gain value from the ones with your success at the core of their recommendations.”

Ben Bilges, I.R.I.S.: “Choose a capable partner and work together on a project roadmap that fits your expectations. This enables you on the one hand to get a realistic overview about your actual state but also defines a final aim. Make sure that your preferred system is scalable and able to grow with your growing requirements. Customers often pay too much attention to the sheer software license costs.”

RULE #19 – LEVERAGE THE TECHNOLOGY YOU ALREADY USE.

Duff Johnson, PDF Association: “Many new projects are Band-Aids applied to old projects. Before you change to system Y, are you sure system X isn't good enough? Maybe you should look again with fresh eyes. There are many aspects of ECM technology that require interoperability across systems, business-units or companies. Seek out standards-based solutions to maximize the ease of integration and migration.”

Brian Tuemmler, Nuix: “You may find a new use for that system you already have in place. It surprises some people that building a legacy content retention category involves similar tasks to discovering litigation content, investigating crimes and protecting classified materials. You can use the same tools with minor changes for all of those use cases.”

Steve Stone, United Bank: “Automating an inefficient process is like paving a cow path. The work is going to wind its way here and there before it is completed. Paving it might make the trip faster, but it doesn't make it shorter. Fewer steps generally means a better, more reliable process. Before investing in technology, see what you can do about straightening out that cow path.”

Greg Milliken, M-Files: “Make ECM more intelligent. Providing fast and precise access to content is good, but intelligently linking content and context is where the value of ECM begins to reveal itself. Linking information in structured data systems (CRM, ERP) to unstructured content repositories in an ECM system establishes relevance. For instance, a proposal is important because it is related to a certain customer that is managed in the CRM system, or an invoice is of interest because it is related to a certain vendor or project. This integrated environment injects more intelligence into decision making processes.”

RULE #20 – THINK BIG, START SMALL, GROW STEADILY.

Pam Doyle, Fujitsu: "You will not overcome digital disruption overnight. Start with a single project. Select one that will yield a 'quick win' to demonstrate proof of concept and the potential return on the investment. This will show sound use of the your resources and will help get the commitment for additional projects."

Ian Llado, DocFinity: "We've seen great success when departmental readiness is evaluated and solutions are implemented accordingly. When deploying solutions to manage digital disruption, some departments may be ready for workflow, eForms, and other advanced capabilities. But in some cases, scanning is all a department can handle. Prepare a list of various stages, evaluate readiness, and give them what they can handle. Once they've mastered that, return to deploy other features and functionalities."

THE LAST RULE – RULE #21 – OH YEAH, AFTER ALL THIS IS AIIM. YOU DIDN'T THINK WE WOULD FORGET, DID YOU? DO SOMETHING ABOUT THE PAPER!

Chelsea Dunshee, Panasonic: "US businesses are becoming increasingly electronic but all too often the world still runs on paper. Scan the paper and ditch it. Operating at maximum efficiency requires reliable, fast processes for bringing paper documents into your digital workflows."

Charley Barth, Cummins: "Don't forget about paper! There is so much focus on digital documents that many times people just give up on the paper holdings. Remember there is legal risk to keeping that paper around and also storage and servicing costs associated with those records. Paper is easier to tackle than digital so perhaps you should look at starting with the paper first."

Tim Osman, OPEX Corporation: "Some believe that it is an all or nothing proposition, leaving existing paper processes in the ditch to fend for themselves. This oversight not only serves to slow the march of progress but it also increases the unnecessary casualties of cost and risk. There is a better way."

AIIM INFOPROS WHO CONTRIBUTED TO THIS E-BOOK

FOLLOW THEM ON LINKEDIN AND TWITTER!  

[Note: All of the following awesome people contributed rules and/or commentary to this e-book, and I am very grateful for your insights. Some rules and comments have been edited/combined, and final responsibility for whether I did a decent job in this task and for this content rests with me.]

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