

Information management best practices guide

5 ways to master modern work



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Introduction

Cybersecurity threats are increasing, regulatory requirements are evolving across the globe and customer expectations are changing. Organizations must make fundamental process adjustments to adapt.

Information management enriches content with context, mitigates risk, connects employees and customers, powers business processes and empowers leaders to anticipate needs and outpace the competition. It has become a key tool for maximizing success, adapting to shifting requirements and mastering modern work.

The shift to modern work presents many challenges:

- Information is distributed and drawn from numerous sources.
- Hybrid and flexible work are increasingly in demand.
- Workers need secure and reliable access to content anytime, anywhere.
- Organizations must actively compete for talent.

In a data-driven world, all companies are information companies. Enterprises must equip employees with tools to collaborate effectively and efficiently.

This guide outlines five information management best practices. Whether an organization is just beginning an information management journey or working to refine and optimize current tools, these tips can help maximize long-term success.



Learn more

To ensure organizational strategy lays a foundation for growth, [start by defining a vision](#). This is an important first step toward implementing an integrated platform to streamline business processes holistically.

“With OpenText, our team works much more effectively because we have the program, services and strategy along with the technology.”

- OpenText customer [Pacific Life](#)

Best practice 1: Think strategy

Align information management with business strategy

Failing to consider the impact of information management in business strategies can have several negative consequences:

- **Lost productivity:** Organizations fall into unnecessarily complex, inefficient business processes that waste time and money.
- **Lack of data to drive decision-making:** Without a holistic, 360-degree view of business processes, making data-driven decisions is very difficult.
- **Poor information security:** Information that is not managed is not protected.
- **Missed opportunities:** Without the insight to delight customers or to enable new ways of working, organizations are less able to compete for business and talent.

How to succeed

To develop an effective digital transformation strategy, organizations should align technology with business priorities to ensure they are prepared for long-term success. For most organizations, this will mean streamlining business processes through integration and shifting toward cloud infrastructure. Outlining a value proposition that clearly aligns technology with business impact will help generate a strong financial justification for these investments.

OpenText offers a range of services to guide customers along the journey from defining their information management vision, to outlining a roadmap, to undertaking digital transformation. The OpenText Consulting team has years of experience helping organizations demonstrate the bottom-line benefits of information management, building strategy aligned to customer visions and ensuring buy-in and adoption across the organization.

[Explore OpenText Strategy and Advisory Services](#)





Best practice 2: Strengthen information protection

Combine compliance, data protection and productivity into a single, defensible governance regimen

Any effective information management strategy must address information protection, ensuring compliance while supporting productivity. Hybrid work and a growing number of business applications are leading to content sprawl. At the same time, security and regulatory compliance risks are escalating due to uncontrolled use of collaboration platforms, evolving privacy requirements and increasingly sophisticated cybersecurity threats.

Implementing information governance best practices can greatly reduce these risks while helping businesses remain compliant, secure and productive.

Organizations should follow a few critical steps to enhance any information governance plan and master information protection:

- Classify and protect information according to a records policy
- Know where risky content is found on the network
- Implement a system to automate information governance and avoid relying on manual approaches

OpenText advocates Zero-Trust Information Governance. This approach starts with taking a closer look at which content contains sensitive data, such as personal, financial and health information. Applying “need to know” level access controls to that content will prevent sensitive documents from showing up broadly in search results.

Limiting access to critical resources through a Zero-Trust approach augments the protection provided by other cybersecurity tools designed to stop threats in progress. According to a Gartner® report “A zero-trust posture, however, is not achieved with a single technology. A mature, widely deployed implementation demands integration and configuration of multiple different components.”¹

In other words, this approach to information protection must be backed by an effective information management strategy.

How to succeed

Discover [Zero-Trust Information Governance](#) or explore the [critical content protection and risk mitigation guide](#).

Discover the range of services OpenText offers to mitigate risk and meet any cybersecurity need: [OpenText Security Services](#)

¹ Gartner®, Predicts 2023: Zero Trust Moves Past Marketing Hype Into Reality, John Watts, Jeremy D’Hoinne, Dale Koepfen, Charlie Winckless, 6 December 2022.
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Learn more

Discover how embracing new ways of work can uplift operational experiences

“Thanks to its deep integration to SAP and roadmap alignment, we chose OpenText to best enable us to align to our vision of a single view of content, managed in one place.”

- OpenText customer *Orica*

Best practice 3: Integrate to optimize

Supercharge operational experience and deliver insight to drive business performance

Twenty-five percent of organizations cite digitizing, automating and integrating processes as their top information challenge.² Implementing business processes without integrated information management can create several challenges:

- **Process inefficiency:** Employees relying on inadequately integrated tools are forced to switch from app to app, slowing down critical business processes.
- **Poor customer experiences:** Chaotic, poorly orchestrated back-end systems often result in less responsive, less personalized customer experiences.
- **Disparate sources of information:** Lacking a single source of truth stifles gathering of critical insights.
- **Poor employee experience:** Time wasted verifying and piecing together information negatively impacts operational experience.
- **Risk:** When critical information is not readily available, it can create significant financial, legal, health and safety business risks.

Weaving information [into business processes](#) delivers numerous benefits:

- **Increased productivity:** Delivering information when and where it is needed streamlines business processes.
- **Empowered employees:** Connecting content from disparate applications leads to seamless employee experiences.
- **Enhanced security:** Identifying and protecting critical information automatically closes critical gaps.
- **Improved adaptability:** Implementing a composable and scalable platform allows it to be customized to the organization's needs.
- **Amplified innovation:** Creating connections can spark insight, helping to optimize employee and customer experiences.

Organizations that manage business processes most effectively harness information in context to break down silos, remove friction and deliver enhanced business insight. OpenText delivers end-to-end, information-led transformations that ensure customers, partners, talent and technology are connected, making the integrated whole more valuable than its individual parts.

How to succeed

Leverage OpenText knowledge and expertise as a product vendor to customize and integrate an information management platform that meets the organization's unique needs. Explore [OpenText Professional Services](#).

² AIIM 2021 Status of the IM industry survey



Learn more

“Region Skåne identified an opportunity to dramatically improve the efficiency, transparency and control of information management.”

- OpenText customer [Region Skåne](#)

Best practice 4: Automate to expedite

Turbocharge and optimize business processes with automation

Without business process automation, organizations cannot sustainably address the ever-increasing number of applications and the ever-growing volume of information. Resulting challenges include:

- Process bottlenecks caused by poorly integrated applications requiring manual steps.
- Delays getting new applications to market when leveraging traditional IT-driven application development processes.
- Overburdened IT teams focused on application maintenance rather than innovation.

To master modern work, organizations must reduce the burden on their employees, freeing them to focus on the most high-value tasks. Business process automation drives:

- Faster, simpler decision-enriching content with actionable insights when and where it is needed.
- Realtime analysis of operational efficiency.
- Optimized workflows for faster ROI.
- Engaging user experiences.
- Fewer errors through the elimination of manual and duplicate effort.

For most organizations, moving to the cloud is a critical step. Seventy-three percent of respondents to a [recent 451 Research study](#) agree that SaaS is now the default or preferred deployment model for new applications.³

OpenText offers two options for cloud-based information management: [SaaS](#) and [private cloud](#). Whether single or multi-tenant, cloud-based applications help reduce or eliminate manual effort in several ways:

- Leveraging a platform [purpose built for integration](#).
- Automating and streamlining functions like [capture, digital signature](#) and [collaboration](#).
- Outsourcing [day-to-day management of the full solution stack](#) to focus on core business functions.
- Leveraging the latest functionality and security updates through automatic application upgrades.

How to succeed

Reduce costs, increase efficiency and use information to its full potential with [Line-of-Business solutions purpose-built for processes](#) across and outside the organization.

Discover how [OpenText Consulting Services](#) has helped customers to automate business processes intelligently through deep integration between leading applications and content management platforms.

³ 451 Research, IT Turns its Attention to Employee Productivity and its Preference Toward SaaS. (2021)



Learn more

Learn more about the impact of adoption on digital transformation.

Identify your biggest contributor to successful user adoption.

Best practice 5: Adopt to transform

Maximize adoption to get the most from modernized solutions

Realizing business value from technology demands that users adapt to new ways of working. Businesses must ensure new investments are broadly and deeply adopted across the organization. Adoption can mean the difference between an information management solution that becomes integral to how the business operates and one that ultimately fails to provide business value.

While a new application's technical benefits may be clear to the buying team, if employees don't embrace the change, it will not be a success. To drive successful adoption, organizations should implement a multi-faceted strategy that encompasses communication, change management, executive sponsorship and training.

Choosing solutions that support the broader business strategy is also likely to facilitate strong adoption. Applications that streamline workflows through integration or simplify business processes through automation are more likely to be widely adopted than "standalone" applications poorly integrated with other tools.

Employees must understand how the new technology benefits them and the organization. They also require training to help them adapt to new ways of working and avoid falling back on familiar methods. Both changes and desired business impacts should be communicated to ensure that employees see their value.

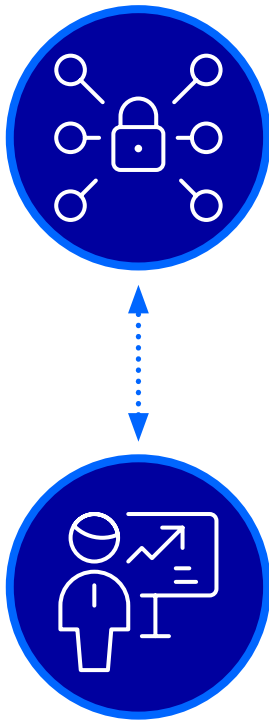
It is important to remember that successful adoption is not a one-time event, but a process.

How to succeed

OpenText offers a range of services to support successful adoption:

- For customers new to OpenText Cloud, [Customer Success Services](#) drives deep adoption as part of a success planning strategy to maximize value realization.
- Customers looking to accelerate adoption of an existing solution can explore [Adoption Services](#).
- [OpenText Learning Services](#) offers training options for all skill levels to support proficiency and adoption.





OpenText helps customers master modern work

The organizations that achieve the greatest success will be those that are able to harness information to drive business transformation. Effective information management helps organizations master modern work by delivering:

- **Operational experience:** Connect content to processes to bridge information silos and stop information chaos.
- **Information governance:** Mitigate risk, control content sprawl and ensure all information and devices are securely managed, both on and off-cloud.
- **Seamless collaboration:** Break down information silos to speed and smooth customer experiences.
- **Frictionless employee experiences:** Attract and retain top talent by providing a modern user experience, streamlining business processes and simplifying decision-making.

To master modern work, organizations need more than just the right technology. Support, services and expert guidance from a strategic partner like OpenText are also necessary to gain the information advantage and stay competitive.

End-to-end information management

OpenText offers a complete portfolio of information management tools to address any business need. Customers also benefit from a united team supporting their customer journey end to end with a unified framework to help them unlock maximum value from investments.





Outcomes for every phase of the information management journey

The OpenText L.O.V.E. model

<p>LAND One small step</p>	<p>Professional Services Deploy optimized information management technology</p>		
<p>Successful deployment means more than just installing and configuring software OpenText is committed to providing a best-in-class implementation experience for customers.</p>	<p>Plan Architecture and integration strategy</p>	<p>Implement Deploy, upgrade and decommission</p>	<p>Integrate Platform extensibility and integration</p>
<p>OPERATE All systems go</p>	<p>Assurance Services Provide proactive security and governance to protect</p>		
<p>Have peace of mind that systems are operating at peak performance 24x7 OpenText platform, solution and service teams provide a frictionless experience.</p>	<p>Manage Platform and solution management</p>	<p>Secure Cyber security and response</p>	<p>Protect Legal support and managed review</p>
<p>VALUE One giant leap</p>	<p>Success Services Empower customers to solve business problems</p>		
<p>Tap into years of experience to turn desired business results into reality OpenText experts deliver measurable business outcomes that ensure customers maximize the ROI of their solutions.</p>	<p>Onboard Adoption and success planning</p>	<p>Enable Job skills and certifications</p>	<p>Solve Targeted use cases and industry solutions</p>
<p>EXPAND To infinity and beyond</p>	<p>Advisory Services Propel customers into the future with modern solutions</p>		
<p>Every company has a unique path to transformation OpenText experts drive digital transformation and cloud modernization to realize the full vision of information management.</p>	<p>Envision Cloud strategy and digital transformation</p>	<p>Migrate Cloud readiness and cloud migration</p>	<p>Modernize Integrate platforms and digitize workflows</p>

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: opentext.com.

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