5 Ways to Accelerate Sales and Service Processes with Better Content Management

Employees and content are two of your most important assets for supporting sales and service. And both are undergoing massive transformation.

Digital employees work from anywhere at any time, and more work happens asynchronously instead of being propelled by meetings and check-ins.

At the same time, the volume of content is growing throughout business systems. But digital employees can't efficiently access and use it *across* systems to create proposals, make decisions based on analysis, create marketing collateral, or execute on other needs due to disconnected systems.

A change is needed to keep productivity high and collaboration fruitful. What's required is efficiently managing the lifecycle, distribution, and use of information across the organization while ensuring that employees have the content they need to do their jobs.

This checklist describes the essential elements you'll need to organize content, support flexible workflows, enhance security and compliance, and allow employees to collaborate and share content anywhere, at any time.

1. Using an integrated platform for frictionless experiences.

As the nature of work changes, the way that digital employees interact and share content must also evolve.

Email just isn't going to cut it anymore. Because email was not designed with collaboration in mind, employees waste time trying to manage their inbox. Multiple versions of documents floating around make it difficult to quickly make informed decisions. And without strong data governance, there is no single version of the truth.
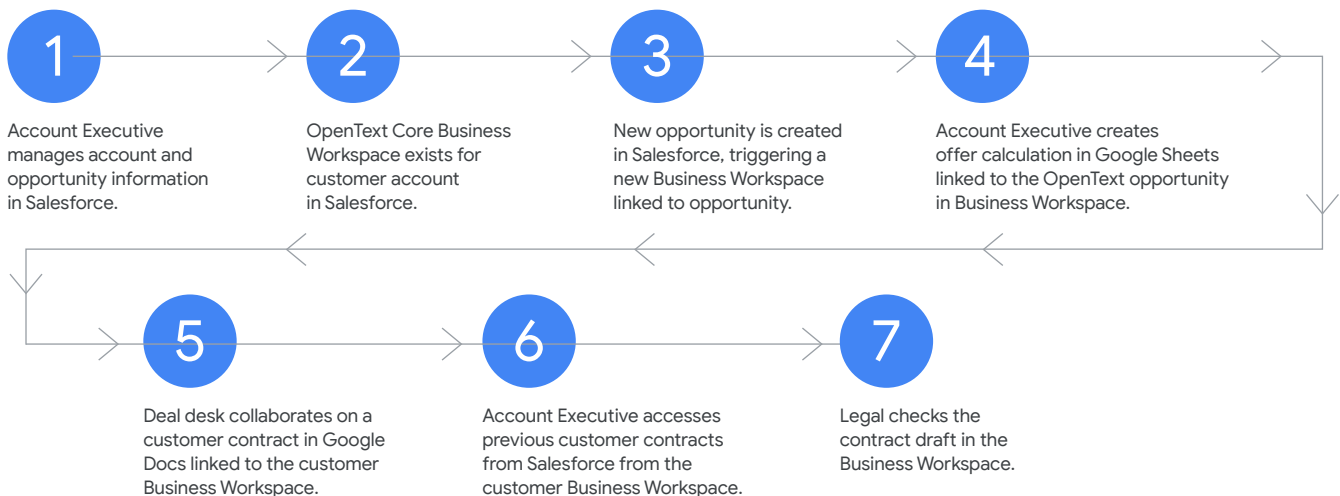
In a sales scenario, emailing back and forth with people to gather information slows down crucial processes like writing proposals, and manually copying content from a CRM system into a proposal template can be time-consuming.

Using an integrated solution is faster and more efficient.

OpenText™ Core for Google Workspace is an integrated platform that brings essential systems data, a secure cloud environment, and business processes like proposal writing together in a unified digital employee experience for accessing and using content. The result is effortless collaboration across content management, daily workflow tools, and lead business applications like Salesforce and SAP.

Use Case: Accelerating the Sales Cycle

OpenText Core information management capabilities, combined with the collaboration capabilities of Google Workspace, empower employees to turn a lead into a sale by streamlining content sharing.

1 Account Executive manages account and opportunity information in Salesforce.

2 OpenText Core Business Workspace exists for customer account in Salesforce.

3 New opportunity is created in Salesforce, triggering a new Business Workspace linked to opportunity.

4 Account Executive creates offer calculation in Google Sheets linked to the OpenText opportunity in Business Workspace.

5 Deal desk collaborates on a customer contract in Google Docs linked to the customer Business Workspace.

6 Account Executive accesses previous customer contracts from Salesforce from the customer Business Workspace.

7 Legal checks the contract draft in the Business Workspace.

2. Embed content management and collaboration into applications.

Today's business systems are powerful at making sense of data—but this analysis is often done in a silo without the benefit of context. Yet managing content and connecting it with the systems and people who need it is instrumental in supporting an intelligent and secure business.

A common place where content chaos can happen is customer service because customer records tend to exist in multiple systems, and customers could be interacting with different people depending upon where they are in the customer journey. With so many variables, mistakes are more common because people can overlook relevant records or access and use outdated information.

To drive better outcomes, increase the power of business systems by injecting more information and context where it's needed to accelerate critical insights, efficiencies, and automation that enable faster and more comprehensive customer service.

OpenText Core for Google Workspace embeds collaboration and content management into business applications and enriches that content by making it easy to support business processes and outcomes.

3. Eliminate content lifecycle management limitations.

Organizations require a secure, central repository to manage business-critical content across the enterprise. However, current content management solutions impose a rigid structure and unforgiving workflows that inhibit creativity and innovation.

An open architecture cloud platform like Google reduces costs as it improves scalability across functions, software, devices, and distances. The OpenText Core for Google Workspace platform provides a 360-degree view of content and related business processes in a single interface that allows users to collaborate from within their business application of choice whenever they want—and always be sure they are accessing complete and up-to-date records.

4. Reduce digital friction to improve productivity.

Employees want to contribute and add value, but current content management solutions create digital friction that inhibits productivity.

The average number of applications a desk worker, also referred to as a "knowledge worker," uses is 11, compared to six applications in 2019 and 47% of digital workers struggle to find information or data needed to effectively perform their jobs.[1]

OpenText Core uses Google Workspace's flexible creation, communication, and collaboration tools to give employees anywhere, anytime access to content in context, empowering employees to work smarter, not harder.

5. Enhance security and governance.

Protecting data is paramount to any content management method. You'll need to manage complex information within a strong security and governance framework.

OpenText Core for Google Workspace reduces risk and improves governance by connecting content to digital business processes. Processes and reporting are transparent and defensible. Automated governance means employees don't have to worry about complex processes.

With OpenText Core and the same infrastructure and security services Google uses for its own operations, data is protected with the highest levels of security.

[1] Gartner® Press Release, Gartner Survey Reveals 47% of Digital Workers Struggle to Find the Information Needed to Effectively Perform Their Jobs, May 10, 2023.

Superior sales and service are within reach.

Closing the sale and delivering exceptional customer experiences comes down to information: providing employees with the content they need, when and wherever they need it. Content management that is collaborative, closely integrates with other business systems, and reduces digital friction while keeping data secure accelerates sales and service processes—keeping customers happy and employees productive.

Accelerate your sales and service processes.