

White paper

9 factors to consider when choosing a Content Services Platform

Build for a resilient future with better access to information, stable processes, effective collaboration and optimal governance.

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Introduction

Information is at the heart of every organization around the world. And the digital revolution has produced a step-change in the types and volumes of information produced and consumed. Ever-increasing amounts of content and data are being generated by fully digital consumer experiences, flowing from connected devices, and produced by expanded collaboration models that have grown to include a multitude of external partners and suppliers.

The traditional methodology of using centralized Enterprise Content Management (ECM) systems to help organize, secure and manage their information no longer works. There are simply too many sources, too many formats, and too much value and risk in all that information.

Organizations around the world are finding more flexibility, scalability and efficiency by moving to content services. Content services technology is purpose-built to improve information access, process continuity, team collaboration and organizational governance in both regular and crisis environments.

However, finding the right content services platform for your organization can be a complex and challenging undertaking if you don't know what you're looking for. This whitepaper will provide nine factors to consider before selecting a content service platform for your organization.

9 factors to choosing a content services platform

Let's take a look at some of the most important aspects to consider when evaluating content service technology for your organization.

1: Consider how you get your information

Do the initial legwork to map out your technology infrastructure and understand how your enterprise acquires, stores, manages and uses information. Don't forget the wide variety of peripheral sources like SharePoint sites, legacy systems and even other ECM platforms. All have data that should be integrated and accessible to your content services platform. Identify gaps, pain points, and bottlenecks in information management and workflows.

An optimal content service platform should easily incorporate functionality that optimizes this current state, while enabling tomorrow's goals. Envision operational excellence that includes automation in ingestion, management and distribution. Plan for a future where AI and analysis will add exponentially more value than they do today.

Approach this stage with one eye on governance of all this information. This is especially important for highly regulated industries like Life Sciences, Energy, Pharmaceuticals and others as security, privacy, best-practices document management and records keeping are increasingly under the compliance microscope.

2: Assess the desired user experience

Usability of conventional ECM systems has been a long-standing problem for knowledge workers. Remember, most ECM platforms were originally developed as storehouses benefiting records managers and legal departments. The users that actually created the information were given little consideration. In fact, they were required to do more work in order for the platform to work properly.

Content services technology flips that line of thought. It's conceptualized with user productivity as a goal. And, in doing so, it opens the door for LOB stakeholders and IT architects to completely re-imagine what the user experience could be.

How Documentum Helps

"When we collected the information, we analyzed the data and what came out of that was we realize that the county would save \$2.9 million annually in just efficiencies and another close to \$500,000 in storage only. Through OpenText Documentum, we're able to meet each of those strategic goals."

Roozan Zarifian,
Chief Information Officer,
County of Los Angeles Department
of Human Resources

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A key step in this assessment is envisioning what a "perfect world" scenario looks like when it comes to process-specific workflows, application interaction and information access. What do people need to see, when, and how? Build around the notion that information classification and management will be automated. Factor in that leading content services work in the background, allowing staff to continue to work in the leading applications they prefer, while automatically surfacing information when and where it's required.

3: Evaluate your current records and document management procedures

Assessing your legacy applications and data sources gives you an ideal opportunity to take a fresh look at your records management procedures. What does the "perfect world" look like in this area—today and tomorrow?

The document management process for leading content service platforms is driven by automated data classification that lessens the user's administration burden while setting up content to be easily contextualized and accessible.

Using content services applications to integrate an existing content management platform with the lead applications that drive business processes allows centrally managed governance policies to be extended to content and data as it's created in those systems. Globally defined, locally applied. Meta-tags are automatically assigned and are updated and refined as the information is used and modified.

Many enterprises have multiple repositories of information under records management. Federated Compliance is ideal for these situations because it provides a single dashboard that covers all repositories, file shares and archive systems.

4: Make sure the proposed solution extends beyond the boundaries of traditional ECM

Unlike an ECM system, a content services platform should focus on supporting other applications instead of being the single monolithic star of the show. A good way to assess this is to consider how a content services platform will enable seamless integration with other applications, processes and information sources. It's through this functionality that information can be automatically identified, classified and distributed to other processes and users who can benefit from its value.

5: Plan for the future

Where content and data is stored today—and tomorrow—should be a primary concern when selecting a content services platform.

Most organizations are struggling with storing the amounts, types and forms of information flooding through channels. Every enterprise is considering the cloud as an option, although many companies are still primarily on-premises. Priorities, resources, cost and even regulations mean a hybrid environment will be the preferred operating model for the near future.

While it's important to identify how your business currently operates, it's just as important to consider and plan how it may operate in the future. That's why the best content services today should be able to cater to both.

A good content service platform should be able to operate on-premise and in the cloud, giving organizations the option to move to either when they are ready, and at their own pace. A benchmark for content services technology that takes flexibility and agility seriously is the adoption of containerization architecture.

Containerized applications allow enterprises to optimize their existing operating environment while enabling a seamless shift to what makes sense in the future. It is the new standard and an essential element when considering a new content management platform.

Containerization is a software architecture model that gives organizations the flexibility to quickly deploy, efficiently maintain and easily scale their technology in whichever cloud or on-premise environment best suits their cost, productivity and risk preferences. Content services platforms that take advantage of this architecture are able to seamlessly shift between any deployment environment and require a fraction of the maintenance.

6: Does the Content Services platform provide the features you need?

A content services platform must support your organization's productivity. That's not just users accomplishing routine tasks quickly, it also involves offering features and functionality that enable knowledge workers to make smarter decisions and fuel innovation by effortlessly accessing and using the right information at the right time.

Not every content services platform offers the same features. The market leaders have an extensive "tool belt" of applications, components and add-ons that cover a wide variety of specialized use cases—from intelligent capture functionality to customizable workspace environments to user-friendly file sharing capabilities that incorporate enterprise-level security and privacy.

7: Ask how emerging technologies are supported in the roadmap

Content services technology is at the epicenter of the technological revolution that will transform enterprises over the next five years.

Advances in AI and machine learning will exponentially transform the capabilities of content services to analyze and act on information and the tasks surrounding it. Automation of many routine activities will be a result, with content services replacing humans as the task managers.

The shift to cloud-based hosting will drastically impact the fundamental content services concept of connecting and bridging information sources. Global connectivity through 5G networks will mean incomprehensibly large amounts of data will be accessible instantly. Content services will be on the front lines of analyzing, classifying and disseminating that information to those who need it.

Collaboration, teamwork and creativity will continue to expand beyond centralized locations. A new generation of knowledge workers are demanding the ability to work when and where they want. Productivity will become more fluid and dynamic. Employees will become more self-directed and entrepreneurial. Content services platforms will be ground zero in giving them the tools and information access to work the way they want—while ensuring adherence to corporate governance policies.

It's imperative that content services vendors communicate a clear, well-documented roadmap of how emerging technologies are incorporated today—and how they will be given "room to grow" as they develop and evolve.

8: Identify relevant regulations and how content services functionality can ensure compliance

Today, every organization—especially those in highly regulated industries—is faced with an increasingly complex and expanding regulatory environment. Over 50% of organizations see automation of compliance and governance as "highly important" or "a deal changer," but for 70% of them, key governance processes remain less than 50% automated.¹

As mentioned above, content services platforms should automate regulatory and compliance requirements as much as possible, but information governance goes beyond just baseline records and compliance management.

It's important to note that as rules and regulations change, so must the way companies manage and use their data. A content services platform must be flexible enough to adapt to and incorporate new regulations.

¹ AIIM, "State of the industry—Content Services" 2019, aiim.org

A great example of the industry being forced to change radically is the adjustments required to accommodate the recent GDPR and the upcoming CCPA. Any content services platform must be flexible enough to be able to accommodate these changes.

Beyond that, the ability of a content services platform to adopt changing regulations means nothing if the affected information can't be easily accessed and governed. Again, the ability of content services to integrate with the previously isolated systems that product and store information is key.

How Documentum Helps

"Today, our clients expect that they will be able to instantly see their documents. This is a mandatory requirement in our industry, and Documentum makes it possible."

Deepak Sharma,
Global IT Director,
Business Solutions and Support Agility

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9: Start the selection

The assessment, selection and implementation of traditional ECM platforms rarely met mission goals over the past decade. Organizations had become sprawling and diversified, digital information was pouring in through new channels, users began demanding light-touch, personalized experiences. The complex process of navigating from initial needs assessment to final user training for a cross-enterprise software stack became unmanageable. The cycle took far too long. Not every need could be addressed. The new functionality was usually outdated by the time it was finally rolled out.

As this paper has outlined, content services are different in focus, architecture and operation. They allow organizations to address issues and opportunities as individual instances: Target a specific goal—whether it be intelligent capture, automating a task, shifting a process to the cloud, etc.—bring relevant LOB users, IT, risk management and others to the table, identify the best solution, implement, move to the next one. Identify, solve, pivot. Think in bite-size servings, not entire buffets.

The right content services platform is the one that will help you use this methodology to achieve your unique productivity and governance goals with the least effort—either through out-of-the-box features, straightforward add-ons or low-code customization.

Think of today while planning for tomorrow. The right content services platform lays the groundwork for a future of cloud, AI and automation that's only been imagined at this point. What you implement today needs to be centered on a vision of limitless adaptability and scalability.

Look for a partner, not a supplier. You're going to need advice; you need to be able to trust it. Research vendor specialization, reputation and analyst assessments. Consider support packages and managed service options.

Conclusion

The shift from an ECM-based model to a content services-driven infrastructure is the natural evolution of information management. Content services platforms and applications offer a whole new universe of options to streamline processes, increase individual productivity and improve governance. Companies that are highly regulated as well as companies simply seeking a more effective content management solution are realizing the benefits of thinking about information management in a new way.

This white paper has outlined nine factors that go into evaluating a quality content services platform. If you are searching for a robust content service solution with cutting-edge technology, why not consider OpenText Documentum?

OpenText Documentum is a content services platform that offers comprehensive information management functionality, including capture, lifecycle management, governance and archiving applications. Documentum solutions are cloud-native, but built to enhance process efficiency, personal productivity and holistic governance in any environment. They embody the OpenText vision of agile, easily scalable solutions developed to help enterprises today and tomorrow.

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Organizations in highly regulated industries have long used Documentum as the content management platform of record to improve productivity chains and maintain stringent adherence to compliance and regulatory requirements.

Take a few minutes to [learn how Documentum](#) and its industry-leading roster of associated content services solutions are helping organizations realize the Information Advantage.

About OpenText

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