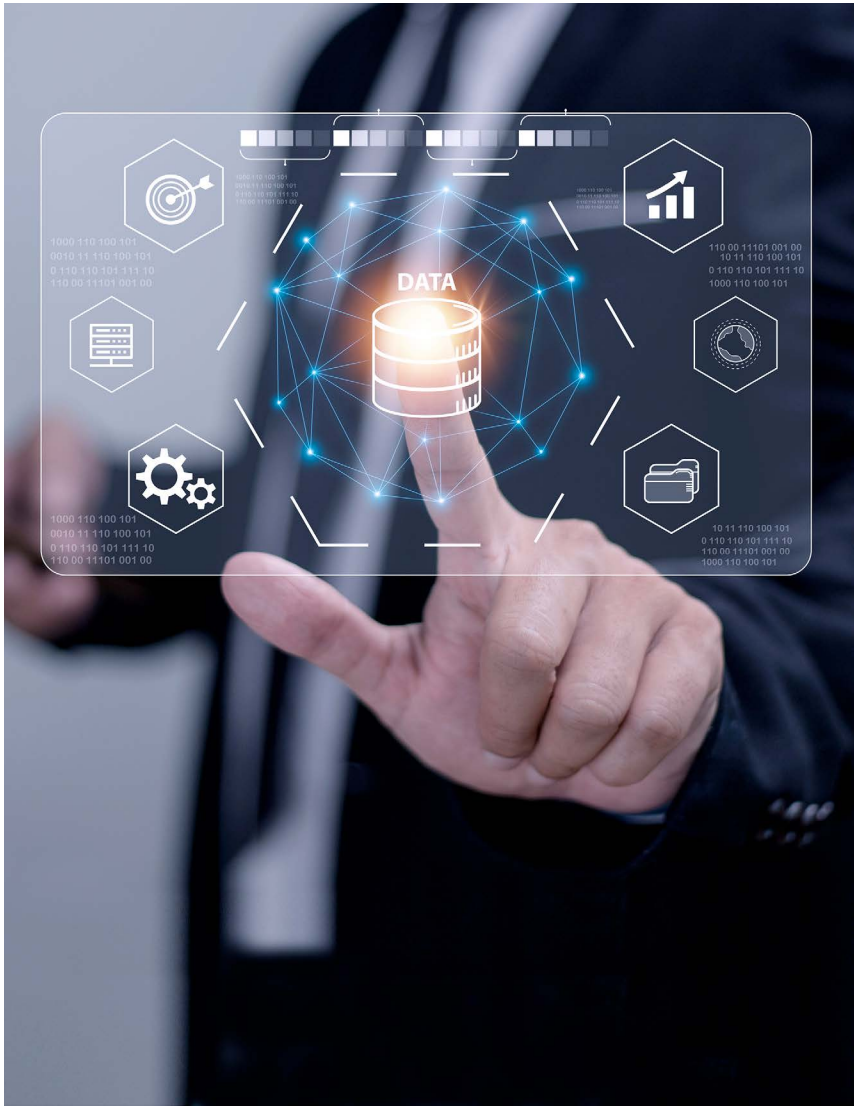
aiim

Jobs to be Done and Tools for the Jobs:

Operationalize IIM for Organizational Success

In Partnership with

IRON MOUNTAIN®



Introduction

More and more users are performing information management duties and tasks as part of their “regular” day-to-day work. In the chapters that follow, we take a deep dive into several of the Intelligent Information Management (IIM) focus areas and apply a “jobs-to-be-done” approach to their operationalization. An expert panel of authors then explores some key considerations in this eBook and we summarize new research findings from AIIM.

Process Improvement a Top Focus

AIIM members say that process improvement is the most important reason to undertake automation. According to our new research, over 30% aim to improve cross-departmental productivity; 28% say it is to improve customer service; and 24% say they need to reduce the time it takes to complete key business processes.

Information Integrity is Essential

Simply managing the content necessary for knowledge workers to get their job done is a struggle for most organizations. To get the job done here, information management professionals are focused on project management, customer service, and product design and development.

Data Extraction and Analysis

Automating the categorization of incoming information and streamlining the extraction of information needed to drive core business processes is a top tactical objective. Making sense of data makes the difference, often using AI and machine learning.

Expert Authors

In this eBook, we turned to an expert panel of authors for their advice and perspective on how to operationalize IIM for organizational success.

- **Jane Ann Harrison** warns us of the importance of tagging content. “If you don’t know where your sensitive data sits, how can you appropriately protect it?” says Jane Ann.
- **Marty Pavlik** explores process mining for process improvement in procurement. “Process mining can mitigate the risks of today’s financial pressures.”
- **Shawn Acheampong** talks about information audits. “They can give you a clean bill of health when it comes to the integrity of your data and your ability to innovate,” says Shawn.
- **George Dunn** says success is found by improving how you support customers and internal staff. “Procedural (non-technology) changes improve process efficiency from 20% to over 75%.”
- **Matthew Bernstein** gives us a process to follow to evaluate data discovery and governance solutions. “Consider four dimensions: discovery, classification, governance, and reporting.”
- **Kevin Craine** explains how superior content services build superior customer experiences. “Customer experience is ‘the new marketing’ because it influences brand perceptions and impacts business performance just as powerfully as traditional marketing.”

We invite you to learn more in this informative eBook. For more about AIIM research visit AIIM.org.

Thank You to Our Underwriters

Our ability to deliver such high-quality research is partially made possible by underwriters, without whom we would have to use a paid subscription model. For that, we hope you will join us in thanking our underwriters:

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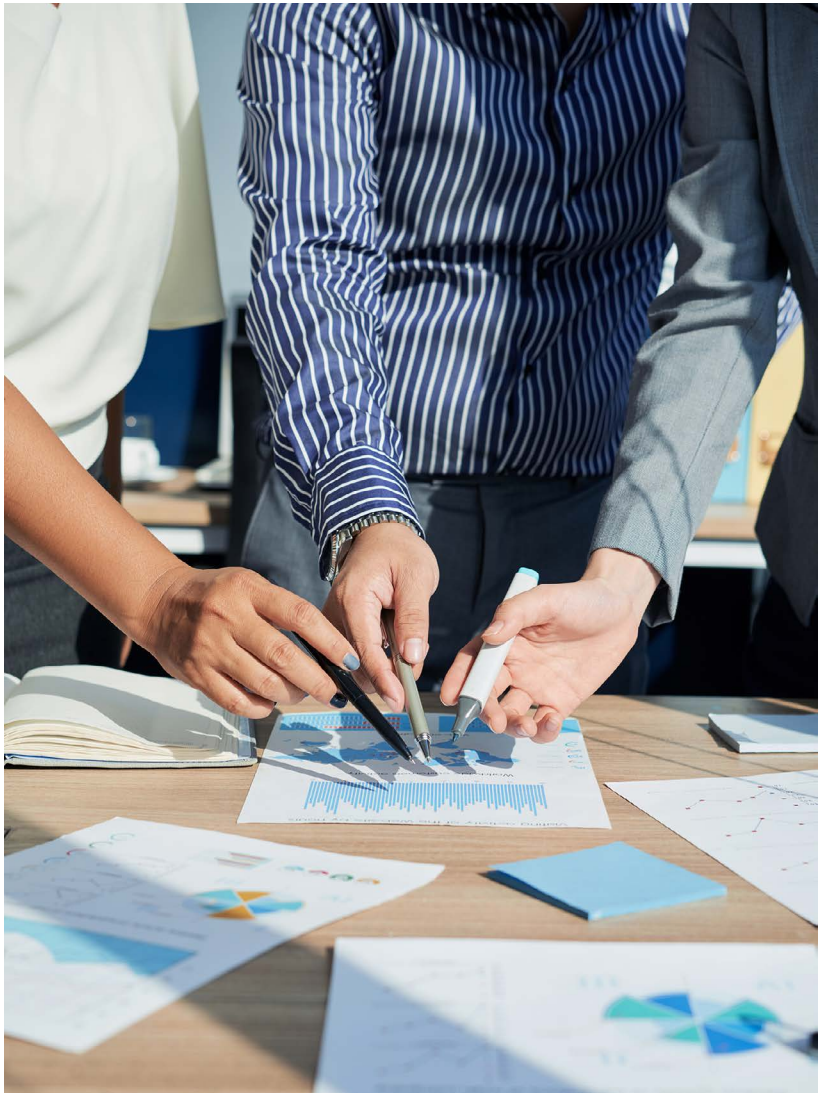
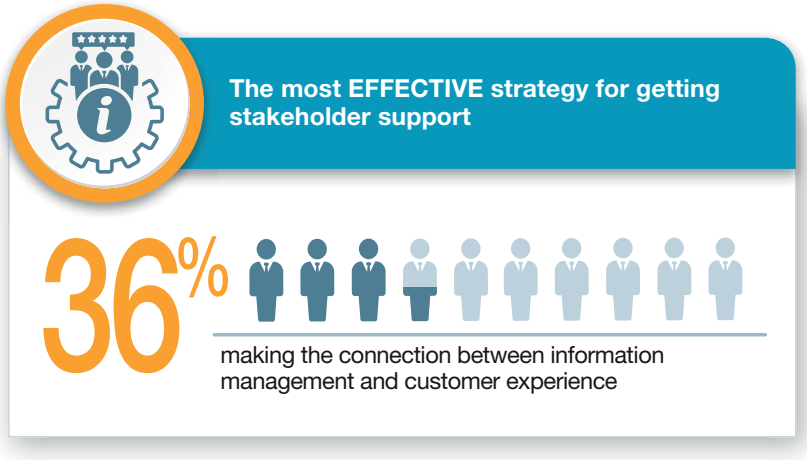


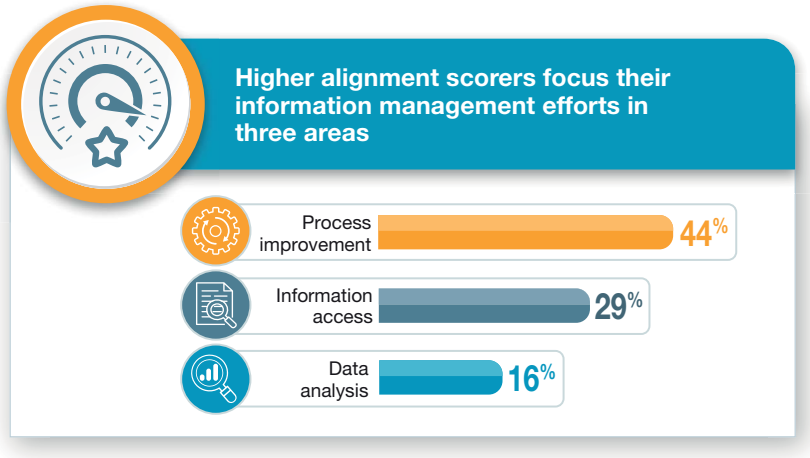
Jobs to be Done and Tools for the Jobs: Operationalize IIM for Organizational Success

By AIIM

Recent AIIM research among hundreds of information management professionals revealed some important data points when it comes to the alignment of information management strategies with business strategies. Companies seeing improvement in the alignment have purposefully focused on the needs and expectations of the customer – both internal and external.



By honing their skills in three key functional areas: **process improvement, information access, and data extraction/ analysis**, Information Management professionals in these organizations created for themselves an indispensable role in moving the organization to its higher order goals including profitability and brand loyalty. Beginning with the mapping of key customer touchpoints to identify process improvement opportunities, they made quick, incremental improvements. They now serve their internal customers by ensuring that the information needed to perform work is accurate and accessible. And, they have become more data literate to help the business extract meaning from varied data sources. Learning from them, we see how the foundations of Intelligent Information Management can truly be leveraged and optimized to accomplish key customer-facing activities.



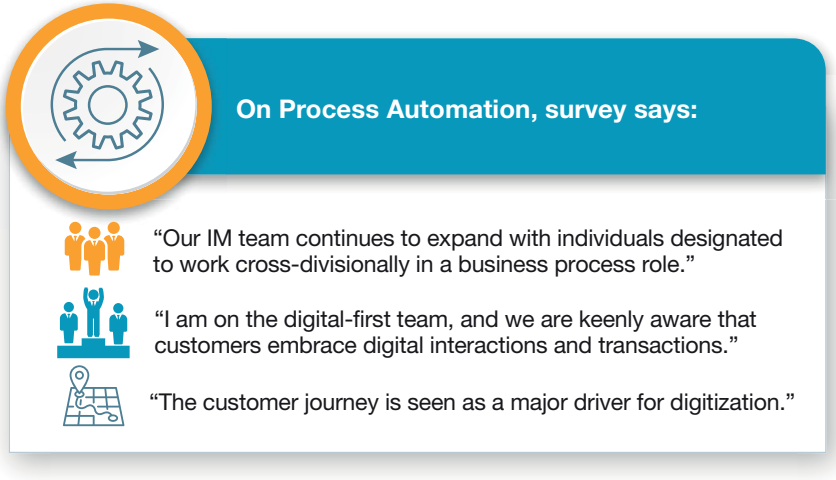
Additional reading from:
Iron Mountain

Learn how a regional energy provider used Iron Mountain Content Classification Service to improve their compliance and information governance of records across 51 field locations in 27 weeks.

Process Improvement/Automation

It is more critical than ever before that organizations make a commitment to move away from manual processes. Many business functions are reaching their tipping point for automation – the point where automating processes becomes critical to accomplishing core tasks with high quality and in a timely manner. This is especially the case where organizations are receiving information through a variety of delivery channels.

In addition, customer expectations for convenience and availability have never been higher. As a result, organizations need the ability to embrace rapid change, spark innovation, and drive superior results. One way to do that is by transforming key business processes. As the stakes for digital competence rise, organizations put their very existence at stake if they do not automate wherever and *whenever they can.*



Organizations are realizing that processes simply can't be automated until the unstructured information that underlies them is in a machine-comprehensible form. They should embrace Artificial Intelligence (AI) and Machine Learning (ML) tools to take the friction – and human onus – out of classifying incoming information and assigning relevant metadata. Organizations can speed up the pace of change by adopting pre-built intelligent automation capabilities that make AI accessible to non-technical business users. These new tools and techniques take what used to be a guessing game, or solutions out of reach for most organizations, and make it infinitely possible. Indeed, as organizations attempt to tackle the next wave of process challenges, they are seeking process platforms that are more nimble, more agile, and more easily deployed by the business to drive innovation and superior customer experience.

Information management professionals can assist their business users in leading impactful content-driven initiatives that significantly improve response time, accuracy, and quality of transactions and interactions such as:

- Employee and customer onboarding
- Claims, order, and invoice processing
- Accounts payable and receivable activities
- Expense processing
- Inbound mail and communications processing
- Loan origination

Information Access/Integrity

Organizations continue to tell AIIM that they face the greatest challenges in dealing with information overload at the intersection of content and processes. They say that simply managing the documents and content necessary for knowledge workers to get their job done is a struggle. Whether it's finding the right information an employee needs when onboarding to a new role or ensuring that another employee's work artifacts are captured for future use, retaining, maintaining, and accessing this organizational knowledge can be a key strategic differentiator.

On Information Access, survey says:

"Our WFH situation allowed us to demonstrate the importance of knowing where our information is so we can ensure it gets to those who need it."

"We convnced leadership to scrap the silos and move toward a process-based ECM profile."

"As colleagues depart the organization, they take tribal knowledge with them. This has made our case for a more centralized approach to information access."

Customer journey mapping within and across departments is a good first step to identifying the gaps that exist in information strategies caused by inconsistent and unconnected information silos. By extending the journey mapping efforts to internal customers, information professionals can more easily gauge employee experience with information management processes and systems.

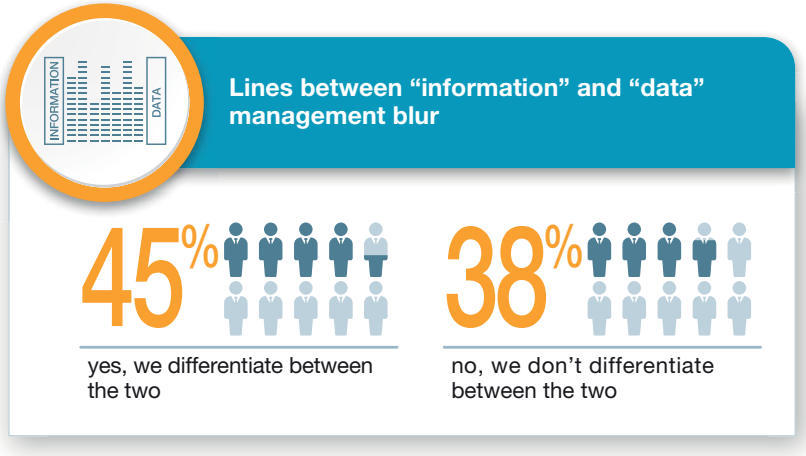
Higher alignment scorers encourage content collaboration across virtualworkforces and organizational boundaries

Think about your own organization and how well it handles its key sources of information and how they are managed. Help users better perform these jobs:

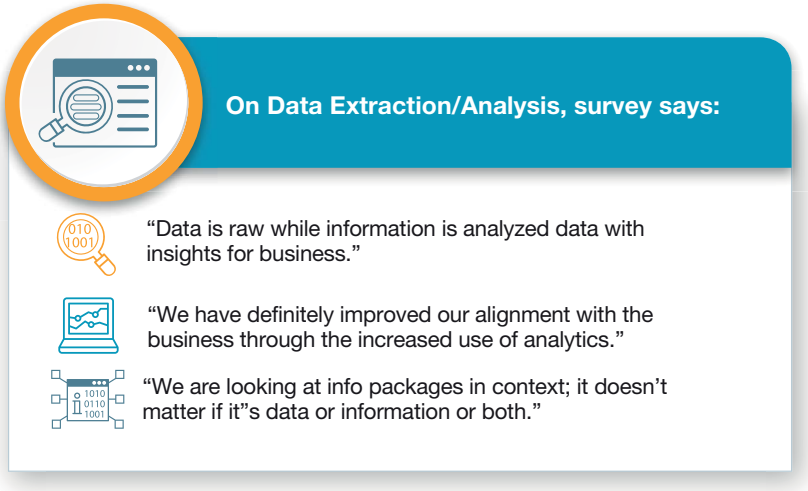
- Project management
- Document authoring/editing
- Customer service and call center activities
- Product design and development
- Federated and full text search functions

Data Analysis

If data is what fuels the digital transformation journey, then organizations must commit to becoming data-driven enterprises. That aspiration need not belong to an isolated team of data scientists and analysts. Rather, information management approaches must encompass a multidisciplinary approach to true data literacy. Only then will the power of big data emerge from the data chaos.



Data is only as strong as its context. By making sense of data, information management professionals can help the business round out its understanding of customers and prospects. By breaking down the organizational information silos, they can create a single customer view based on quality, connected data. "We focus our efforts on data and insights in order to provide the most relevant goods and services to our customers," says an AIIM survey responder in the manufacturing sector. Being able to bring data and information together is key to overcoming a siloed approach to the customer.



Consider the ways that your organization can leverage automated tools to prepare ALL of its information – both data and content – for the era of machine learning to better perform these jobs:

- Customer sentiment analysis
- Patient and case management
- Customer/employee data extraction and protection
- Auto classification for records and archival functions

Self-service Information Management

More and more users are performing information management duties and tasks as part of their day-to-day work. This is an outsized opportunity for the information management professional to provide the guidance and the tools to make this as seamless, easy, and good as it can be.

In the chapters that follow, we'll take a deep dive into each of the Intelligent Information Management focus areas and apply a "jobs-to-be-done" approach to their operationalization. The Jobs to be Done (JTBD) framework is a theory pioneered by Harvard Business School Professor Clayton Christensen. It's a means of understanding underlying customer/employee motivations that influence the buying and consumption process. According to the jobs to be done framework, a customer doesn't really *buy* a product; they *hire* it to get a job done. In this sense, a job to be done is defined as the goal a customer – whether an internal or external individual – is trying to achieve.

We invite readers to learn about the most in-demand information management jobs to be performed in the modern workplace and the right tools for getting them done right.

The Importance of Tagging Content

By Jane Ann Harrison, Client Engagement Director, Bernstein Data

The importance of tagging data is becoming more and more crucial for companies due to increased privacy law requirements and the ability to comply with those regulations. Gone are the days of keeping everything just in case you might need it, especially any kind of personal data. The near future is pointing to companies being required to dispose of personal data once retention requirements and regulatory obligations have been met. Having extremely long retention requirements for data, without a legitimate business reason, will be a hard sell especially regarding personal data.

Tagging content is a key component in not only classifying and protecting sensitive information such as PII, but also in managing the lifecycle of information. In order to ensure compliance with company policy, such as a Records Retention Schedule, and dispose of information once retention requirements and regulatory obligations have been met, organizations must take the first step to identify the record types and apply retention requirements based on their records retention schedule. Tagging data with security classifications allows a company to be able to protect sensitive and confidential information, applying safeguards to what needs to be protected at a higher level. For example, the tagging of personal data can enable a company to locate that sensitive data quickly and easily in order to meet requirements that stem from privacy laws.

If you don't know where your sensitive and personal data sits, how can you appropriately protect it and defensibly dispose of it? Therefore, the first step is to find and tag that sensitive data to meet regulatory obligations for managing and protecting it.

While the tagging efforts for Security Classifications are very important and help to drive Data Protection efforts and the ability to comply with privacy laws regarding personal information, tagging data against the records retention schedule and applying retention to data is incredibly important in managing the lifecycle of information. Data Discovery tools have the ability to locate and tag for both security levels and for applying retention timeframes. The data discovery tool will be dependent on the needs of the organization and its business requirements.

Managing the lifecycle of information per the records retention schedule enables organizations to defensibly dispose of information that is no longer required to be retained for regulatory obligations or business needs. Data minimization can be achieved by appropriately tagging data by record type and applying retention and disposal processes to the data.

Consistently applying and following retention and disposal processes enables organizations to only retain the information they need to run the business and are legally required to retain. Eliminating volumes of information that are not needed also improves operational efficiencies by being able to find the right information at the right time, controls the cost of storage and discovery efforts, and reduces risk by ensuring compliance with company policy and regulatory obligations.

Before we are able to protect data, comply with privacy laws, and defensibly dispose of information no longer needed, we have to go through the process of identifying and tagging content. Tagging data is the foundational component that will enable organizations to meet regulatory obligations and effectively manage the information life cycle.

Process Mining Improves Procurement

By Marty Pavlik, Executive Vice President, Doculabs

Process mining can combine with procurement strategies to mitigate the risks of today's financial pressures (supply chain, inflation, labor shortages, etc.). As your business improves its procurement process execution, you also build resilience against those pressures.

There are opportunities for process improvements throughout all levels of your organization – from procurement to accounts payable for example. Process mining provides real-time data and insights into how well or how poorly your processes are being executed.

Increasing efficiency for procure-to-pay processes delivers value by eliminating spend, productivity, & working capital draining execution gaps that exist in every business.

Process Mining and Procurement Processes

Process mining connects the data in these processes to identify exactly where execution is failing. By accessing the event log data of the business systems used in procurement processes, process mining can "X-ray" your processes, providing a real-time look at your procurement. Are any individuals or divisions going rogue and buying supplies on an ad hoc (and expensive) basis? Are accounts payable on track or deviating from the norm? Are you taking advantage of cash bonuses for early payment?

How does process mining work to remove procurement process execution gaps? Here is a high-level overview:

Process mining extracts data from multiple data sources – from ERP to Excel spreadsheets to procure-to-pay software – to provide a real-time X-ray of your procurement processes from beginning to end. Your "X-ray" isn't static. It continually evolves as the data changes.

You can benchmark regions, business units, buyers, and requisitioners against each other to identify process patterns, execution gaps, and best practices across your business.

You can monitor process performance against best-practice models to identify inefficiencies, the impact, and the root causes.

Recommendations are based on execution best practices to remove process inefficiencies.

You can automate improvement actions across systems while alerting and deploying the right people to remove execution gaps when manual intervention is required.

Inefficient Procurement Processes Equal Lost Opportunity

Inefficiencies cost you money. Research from process mining ISV Celonis identifies three procurement process execution benchmarks for average and top-performing businesses:

- **Spend under management.** Top performers influence 75% of their total spend; average companies influence 47%.
- **Supplier delivery reliability.** Deliveries for average companies are on time 54% of the time; for top performers, it's 83%.
- **Cost per purchase order.** Average companies spend $15 to process each PO; for top performers, the cost per PO is $1.35.
- **Take a second** and compute what those improvements would mean in your organization. The $$$'s get pretty big pretty fast even with a nominal realization rate of 10-20%.

3 Gaps Process Mining Can Find and Help Fill

Process mining will identify the extent of the process gaps for these procurement processes.

- **Maverick buying**. Rogue buying increases risk, results in higher spending, and can hurt productivity as ad-hoc suppliers aren't as incentivized to deliver on time as regular suppliers. Process mining identifies instances of maverick buying and based on business rules, blocks access to the requisitioner or rejects maverick purchases. By pointing the process analysis internally, you can find out which units and personnel require additional training to follow the company line.
- **Inaccurate and/or late delivery times.** Process mining can identify where master data parameters are incorrectly leading to late customer deliveries. It can also identify delivery patterns to either automatically update planning parameters or to alert the planning team of a potential systemic issue.
- **Free-text requisitions** add costs to purchase orders by slowing down purchasing and wasting employee time. Process mining allows the automatic conversion of a free-text purchase request to a PO from an existing approved catalog vendor to the requisitioner.

Only the Beginning

By pulling data from disparate, disconnected systems, process mining provides an X-ray into your procurement processes. What process improvement opportunities will your data reveal?

Information Audits are Your Clean Bill of Health

By Shawn Acheampong, Digital Transformation Specialist, Tumii Transformations

When visiting a new doctor, a thorough check is essential. Our medical background, prescriptions, and overall history of events collectively give the doctor what is needed to complete their health assessment. All of this is designed to lead to the desired *clean bill of health*. Information Audits are very similar to a doctor's assessment. They enable us to reach a state where our business activities are fully healthy and legally defensible.

Information Audits enable organizations to ensure that security safeguards are in place, the integrity of your data is measured, and the business processes and decisions (purported through the information) represent a full historical account of company activities.

It's easy to just do our jobs serving customers and making money without checking in the rearview mirror. Not only does the tax man *commeth* but also staff issues and customer complaints. In heavily regulated industries like health care or energy, this is particularly important to protect the environment, people's safety, and money.

Let us unpack the activities associated with an Information Audit.

The first stage is the **planning** stage. It's a matter of scoping a case or a focus area that is perceived to be at risk or is naturally at risk as part of the work itself. The perceived risk is measured against internal policies and industry standards.

The second stage is the **assessment** itself where we investigate activities, staff duties, procedures, and records associated with the selected business activity. This stage will involve executing field samples, documenting all observations, and concluding with an exit meeting to discuss observations. The observations are specific evidence of activities inside and outside the routine course of business and records keeping completeness.

The third stage is to **report the findings** of the Information Audit. It includes drafting a report and conducting a peer review. Note sometimes this can be contentious. Make sure it's all about empirical evidence that can be corroborated!

The final fourth stage is about **improvement**. Use the results to discuss and establish an 'action plan' to remediate these findings. Once the department has been able to complete the action items, they will see the desired clean bill of health and maintain a legally defensible posture on a day-forward basis.

As an information professional, you need to be in position to not only conduct Information Audits but provide guidance, support, and direction to succeed. The transition can take years and may include action items such as digitizing vital records, tagging electronic content with security controls, or ensuring a system of record has the right provisions for maximum uptime. Overall, be there with the departments to walk through this digital transformation journey.

Build a framework in your organization to conduct Information Audits, especially if you're a heavily regulated organization dealing in things like food, healthcare, aviation, transportation, oil and gas, or the government. An Information Audit Framework in your organization will reap the benefits of knowing that you're reducing your risk and can ensure a clean bill of operating health.

The Why, the How, and the Benefits of Improving Your Processes

By George Dunn, President,
Cre8 Independent Consultants

Regardless of the size of your company or industry, the key to operational improvement and deployment of new technologies is improving how your organization's processes support your customers, internal staff, and vendors.

- **Why should you conduct process improvement?** We find that procedural (non-technology) process changes can improve process quality, efficiency, service, and governance from 20% to over 75%. In addition, we find that defining and cleaning up processes before implementing any new information system will better define the system application requirements. Results include the new system being set up/configured correctly, arriving on time/on budget, and being accepted by the internal users – a big win!
- **How can you achieve the above results?** We find this simple approach works the best.
- **Examine your current processes.** Start with a high-level process map. This map provides an easy way to help users discuss the major steps of their processes, brainstorm ideas, reduce re-work, and identify ways to improve customer (internal and external) service. A high-level process map will also help define the project's scope and size before "diving into the details."
- **Conduct detailed process mapping to document "step by step" how the process works.** It is important to note that often documentation does not exist, is outdated, or is not detailed enough. As necessary, review what does exist and work with the users to write down gaps for specific areas or document the full process when needed.
- **Conduct a process redesign to identify what is required to improve process quality, efficiency, service, and governance.** Intervention examples include the following.
- **Procedural changes** – A powerful and low-cost approach to effect rapid and significant improvement. These changes are free to the organization, other than time to work with the teams to conduct process baselining and redesign. If correctly identified, agreed to, and managed, these changes roll out in 30 to 60 days.
- **Better use of owned technologies** – A great way to gain an additional return from money already invested in existing systems. Focus on simple configuration changes and modules that are not fully utilized. Develop requirements to guide the vendor or internal IT team.
- **Advanced technologies** – Tools that can radically transform your organization. This includes technologies such as new data systems/platforms, intelligent capture, eforms, recognition, esignature, workflow, electronic content management, robotic process automation, artificial intelligence, and machine learning. To optimize these tools is important to envision the new realities and paradigms possible.

  After this, now you are ready to roll out your procedural changes by using a change action plan to track when they are completed, develop user and configuration requirements to guide the implementation team, and select the correct vendor and platform. It's all about the process!

Evaluating Data Discovery, Classification, and Governance Solutions to Enable the Information Management Professional

By Matthew Bernstein, Information Management Strategist, Bernstein Data

IT solutions that discover, classify, and govern information at a massive scale are now readily available and can be powerful tools for Information Management professionals. But the diversity and complexity of available solutions that extract and analyze data are overwhelming, and the cost and challenges of implementation are difficult to anticipate.

How does the Information Management professional advise their organization on choosing such a tool?

In implementing any IT solution there are standard reliability and security concerns, and deployment costs and efforts must be considered. Adequate security and business continuity are table stakes for any solution to be considered, and deployment and cost issues are critical.

But Information Management (or Governance) "functionality" should be the paramount consideration.

Fundamentally, the question is: does the solution deliver the data insights, and support the actions, that will enable the organization to achieve its Information Management objectives (such as records retention, privacy, and information security)?

Some of the key "functional" questions to be considered are: Which "Data Discovery" solutions can find data in the relevant data repositories and with meaningful results? Will these tools support the use cases that an Information Management professional is addressing? Can the solution implement "governance" decisions: taking action on data discovered and classified?

These overarching objectives of insight and action may be assessed by considering four dimensions of functionality, as outlined below. While these four categories are comprehensive, the list of questions and examples does not exhaust the issues. But a framework for assessment such as this can help clarify and support decision-making.

Discovery

Can the tool examine all the relevant data repositories in use and necessary to meet the organization's objectives? These could include network file shares, MS365 (Azure Outlook online) and Outlook on-prem, enterprise SaaS applications (such as Salesforce), Mac and Windows environments and applications, Google Workspace, online collaboration tools (such as Slack and Teams), and desktop machines.

Can the tool analyze the diversity of file types in use, not just the obvious Office 365 applications? This might include email content and attachments, PSTs, PDFs with hard to "OCR" content, and electronic messaging, to name just a very few.

How does the tool initially discover potentially relevant data: does it look only at metadata or does it examine content?

Classification

Do the solution's search algorithms incorporate predefined parameters for the Information Management or Governance use case Parameters in question? In other words, is there an "out of the box" baseline set of keywords, regular expressions, and patterns that serves your purpose, or is the tool so "flexible" that you must do all the work?

Can the tool conduct “policy simulation” (testing current compliance) by easily incorporating key terms, taxonomies, and retention periods from existing policies and schedules and evaluating where and how that data is managed?

What approaches does the tool use to “classify” files and data? What are the NLP (natural language processing) techniques employed and why? Does the solution incorporate Machine Learning to discover and classify files, documents, and data that cannot be discerned with NLP techniques (e.g., due to lack of regularly-occurring keywords)?

Can multiple Discovery and Classification techniques be combined in the development of use cases, creating a comprehensive and integrated approach to classifying information?

Can the user adjust the sensitivity of classification to vary between assuring all potential examples are captured (“recall”) versus finding only results that are highly relevant (“precision”)?

Governance

What is the ability of the tool to apply “tags” or “labels” to files and can they be applied both on-premises and in the cloud?

Can the solution act on an identified “class” of data, by copying, moving, archiving, or deleting that data, or are specialized tools (and organization resources) required? If an archive is to be created, can automated “retention” be applied, such that actions such as deletion will be triggered at a later date?

Will the tool continue to monitor and classify data, automatically identifying information of concern on an ongoing basis and reporting this data for review and governance actions?

Reporting

Are users able to easily see and report consolidated results of multiple searches and classifications applied to large amounts of data?

Can results be reported for use cases or classes of data that integrate metadata, NLP, and Machine Learning techniques?

Are visualization tools integrated in the solution or are significant data export, manipulation, and reporting resources and efforts required?

Framework

By applying a framework, such as the above, to evaluate “core functionality” *at the same time as security, cost, and deployment issues are being considered* the Information Management professional can avoid some of the major pitfalls that result in unsuccessful projects. Choosing the right tool – such as not buying a “bazooka to kill a mosquito” – is critical in achieving an organization’s objectives.

Superior Customer Experience with Superior Content Services

By Kevin Craine, MBA, Content Strategist,
Host of AIIM On Air

It's one thing to land a customer, it's another to keep them coming back for more. But if you do, your profits and your brand reputation can skyrocket. The average conversion rate for a new customer is somewhere between 1% and 3%.[1] However, a repeat customer has a 60% to 70% chance of buying again and again.[2] The more repeat customers you have, the less you'll have to spend on getting new ones in the first place.

Gain the Customer Experience Advantage

Providing a superior customer experience (CX) is now essential to compete. Nearly 40% of leaders say that customer experience is their top priority, and 66% look to improved CX as a competitive advantage.[3] How can you do it? Start by recognizing the vital importance of customer experience.

32% of customers will walk away from a brand they love after a single bad experience.[4]

75% of customers overlook pricing and buy from that offer a good customer experience.[5]

80% of organizations' future profits will come from just 20% of existing customers.[6]

Experts call CX "the new marketing" because it influences brand perceptions and impacts business performance just as powerfully as traditional marketing. Customer service agents must have workflow systems that minimize exceptions and speed resolution time; including a single view of customer correspondence, account history, contracts, and other documentation.

Avoid Disconnects

More than 85% of customers expect seamless interactions.[7] What are the top reasons why agents miss the mark?

- Incomplete or missing information.
- Critical customer documents not linked to information in the CRM system.
- Gaps between inconsistent and out-of-date information in multiple systems.
- No access to needed content required to complete their work.
- Difficult collaboration tools.

Often the big disconnect is because CX teams are not connected with the unstructured information. It is essential that customer service agents move seamlessly between information channels and have a complete view of customer information including things like sales history, previous calls, accounting summaries, and contracts.

Make It Intuitive

Globally, 54% of all consumers say that they have higher customer service expectations than they did just one year ago.[8] If customer service agents struggle with their system it can be difficult to provide superior customer service. An intuitive user system helps enhance productivity and allows users to remain within the business application they are most comfortable with and enables access to all the necessary information to get their job done. Agents benefit from client resolution workflows built into their system with proper metadata, data integration, and information governance all done behind the scenes.

Moving Forward

Customer experience is at the center of success for any organization. When asking consumers what impacts their level of trust with a company, offering excellent customer service ranked number one.[9] Being able to find the right information quickly can drastically improve both perceptions and results. Look for providers and partners with the right expertise, capabilities, and vision to help you find success with your efforts.

Notes:

[1] ***Smart Insights*** *https://www.smartinsights.com/ecommerce/ecommerce-analytics/ecommerce-conversion-rates*

[2] ***Farris, Marketing Tactics*** *https://www.amazon.ca/Marketing-Metrics-Definitive-Measuring-Performance/dp/0137058292*

[3] ***NTT DATA*** *https://www.yahoo.com/now/ntt-data-research-reveals-executives-140500505.html?guccounter=1&guce_referrer=aHR0cHM6Ly93d3cuZ29vZ2xlLmNvbS8&guce_referrer_sig=AQAAANwSbrtwtWU9ilw0EHfHwoGAmUEWlhGHOLtmkzznftH0VIYaWrmM1sUx3wCR-LWiLoq-WB6bnP0GC1KS-sO0QCXzkbqubHMpaG4fVqSuRjMc-KFzmK7ikv14ZLjFEKSOg-r5pP3Ho2yL-sqqJY4Ky8r5jJGVL2VMspxSp7KfT6MZ*

[4] ***PwC*** *https://www.pwc.com/us/en/services/consulting/library/consumer-intelligence-series/future-of-customer-experience.html*

[5] ***ZenDesk*** *https://www.zendesk.com/cx-trends-report/trend-1/*

[6] ***Gartner*** *https://www.newmediaandmarketing.com/focusing-customer-retention-profitable*

[7] ***Gladly 2020 Customer Expectations Report*** *https://cdn2.hubspot.net/hubfs/2771217/2020%20Customer%20Expectations%20Report/Gladly%202020%20Customer%20Expectations%20Report.pdf*

[8] ***Microsoft State of Global Customer Service Report*** *https://info.microsoft.com/rs/157-GQE-382/images/EN-CNTNT-Report-DynService-2017-global-state-customer-service-en-au.pdf*

[9] ***Dimensional Research*** *https://d16cvnquvjw7pr.cloudfront.net/resources/whitepapers/Zendesk_WP_Customer_Service_and_Business_Results.pdf*

The Most In-Demand Information Management Jobs for the Modern Workplace

By honing their skills in three key functional areas: **process improvement, information access, and data extraction/analysis,** Information Management professionals can close the gap that typically exists between information strategies and business strategies. Those with higher alignment success create for themselves an indispensable role in moving the organization to its higher order goals including profitability, growth, and brand loyalty.

Process Improvement & Automation

Most important reasons for undertaking process automation

- **32%**
- **28%** to improve customer experience
- **24%** to reduce time to complete a process

It is more critical than ever before that organizations make a commitment to move away from manual processes. Information management professionals can assist their business users in leading impactful content-driven initiatives that significantly improve response time, accuracy, and quality of transactions and interactions such as:

- Employee and customer onboarding
- Claims, order, and invoice processing
- Accounts payable/receivable activities
- Inbound mail and communications processing

Information Integrity & Access

Simply managing the documents and content necessary for knowledge workers to get their job done is a struggle for most organizations. Retaining, maintaining, and accessing this organizational knowledge can be a key strategic differentiator.

Higher alignment scorers encourage content collaboration across virtual workforces and organizational boundaries

- **60%** have an explicit strategy and systems to support this

Think about your own organization and how well it has a handle on its key sources of information and how they are managed. Help users better perform these jobs:

- Project management and editing
- Customer service and call center activities
- Product design and development

Data Extraction & Analysis

- **17%** use intelligent capture and recognition/extraction tools in use at key ingestion points
- **27%** utilize multi-channel capture tools

... to automate the processing and categorization of incoming information (in all forms), including the extraction of data and information needed to initiate or drive core business processes.

Data is only as strong as its context. By making sense of data, information management professionals can help the business round out its understanding of customers and prospects. Consider the ways that your organization can leverage automated tools to prepare ALL of its information – both data and content – for the era of machine learning to better perform these jobs:

- Customer sentiment analysis
- Patient and case management
- Customer/employee data extraction and protection
- Auto classification for records and archival functions

In Partnership with

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Iron Mountain Incorporated (NYSE: IRM), founded in 1951, is the global leader for storage and information management services. Trusted by more than 225,000 organizations around the world, and with a real estate network of more than 85 million square feet across more than 1,400 facilities in over 50 countries, Iron Mountain stores and protects billions of valued assets, including critical business information, highly sensitive data, and cultural and historical artifacts. Providing solutions that include information management, digital transformation, secure storage, secure destruction, as well as data centers, cloud services and art storage and logistics, Iron Mountain helps customers lower cost and risk, comply with regulations, recover from disaster, and enable a more digital way of working.

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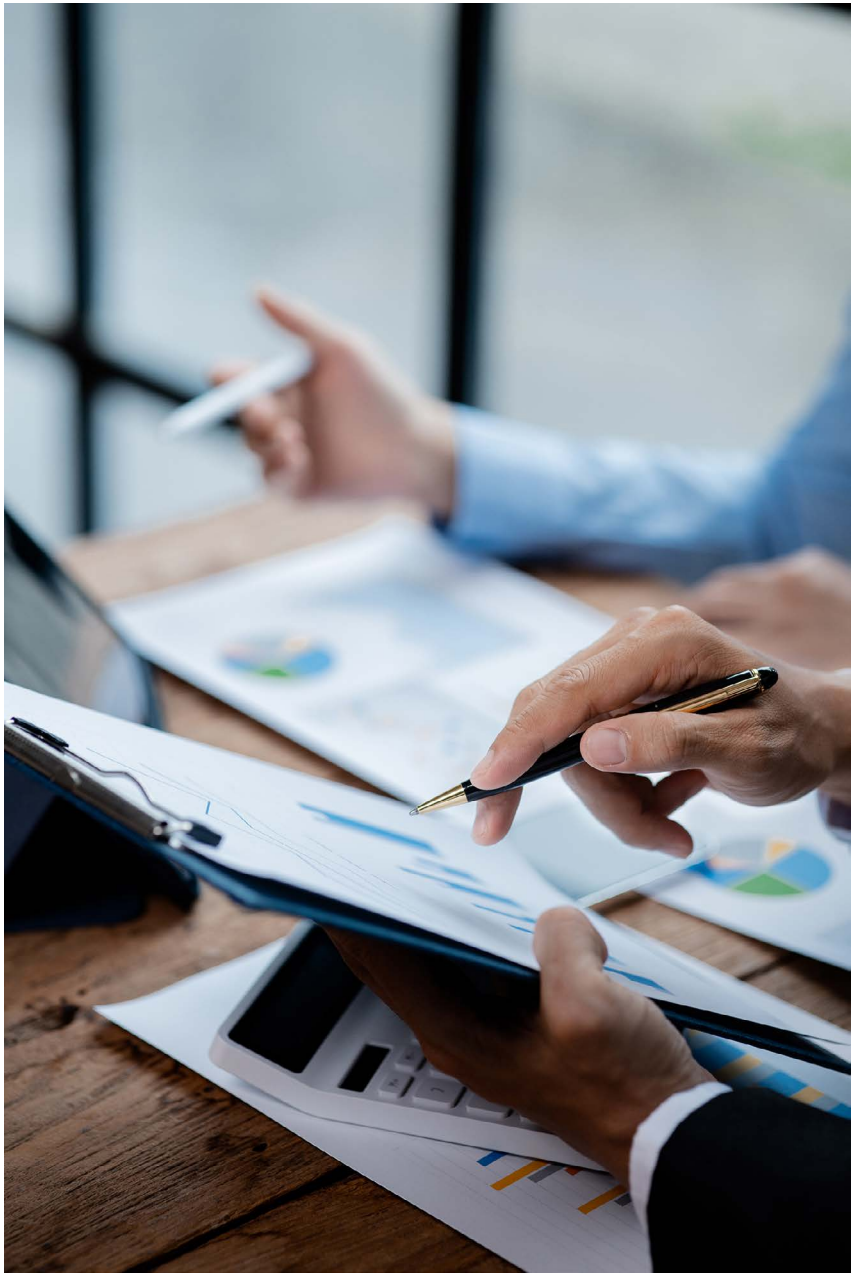

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