



**WHITE PAPER**

# 10 MUST-READ TIPS FOR SELECTING AN ECM SYSTEM

# CONTENTS

- 04/ ONE: IMPROVE PRODUCTIVITY
- 05/ TWO: EMBRACE METADATA
- 06/ THREE: IMPROVE COLLABORATION
- 06/ FOUR: CONTROL RISKS
- 07/ FIVE: AUTOMATE YOUR BUSINESS PROCESSES
- 08/ SIX: CHOOSE A USER-FRIENDLY MOBILE SOLUTION
- 09/ SEVEN: FOCUS ON EASY DEPLOYMENT
- 09/ EIGHT: ENSURE SCALABILITY THROUGHOUT THE BUSINESS
- 10/ NINE: MANAGE INFORMATION INTELLIGENTLY
- 10/ TEN: DO YOUR RESEARCH - REVIEW ANALYST REPORTS

# HOW INTELLIGENT INFORMATION MANAGEMENT CAN MAKE YOUR BUSINESS MORE COMPETITIVE

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**The volume of data created each year is growing faster than ever before. How much of that data has business value?**

Research firm IDC estimates that 33% contains information that might be valuable if analyzed.<sup>1</sup>

In today's competitive business climate, the key is to identify the data that is useful so that we can make informed decisions based on accurate, up-to-date information.

By deploying an Information management system, organizations benefit from the quality, integrity and accuracy of their most critical information. The system also supports knowledge workers by making information easier to find and use. Information management can also be used as a means of controlling risk and ensuring compliance, enabling consistent workflows, and harmonizing processes. Finally, an organization can achieve substantial cost savings by managing their information with an ECM platform.

In this whitepaper, we list the following **10 tips to consider when choosing an ECM system for your business.**

# ONE: IMPROVE PRODUCTIVITY

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## THE COST OF NOT FINDING THE INFORMATION YOU NEED

According to an IDC study, up to 30% of a single workday is spent searching for information.<sup>5</sup> In general, this is because information is scattered across different systems, network folders, emails, and even still found in paper documents.

Another challenge is that a growing amount of data is unstructured data. A typical example of unstructured data is a text-heavy document, where information is often difficult for computers to understand which makes it difficult to classify.

## IDENTIFY AND FIND BUSINESS-CRITICAL INFORMATION

Enabling employees to quickly find information when they need it is the most compelling reason to implement an information management system. Advanced Information management systems support a more intuitive enterprise search for users via a single-user interface. When search capabilities are enabled with metadata, information becomes easier to find – in whatever context it exists – rather than simply stored, as the correct information can be found wherever it's saved.<sup>2</sup>

Also, search is not restricted solely to data saved within a single silo or even the ECM platform itself; instead, it is possible to search for information across multiple platforms – like CRM, ERP, and network drives. Searching for information across all systems, based on what it is and not where it lives, means users are offered precisely the information they need, regardless of where it resides.

## IDENTIFYING THE ONE CORRECT VERSION

A typical problem within organizations is that several versions of the same document exist. In some cases, they are saved in different locations, making it virtually impossible for a user to know which version is the most recent one. Intelligent information management systems ensure that there can only ever be one single and most up-to-date version of each document at any point in time. For deeper insights, users can also review version history of each document to see who performed the last edits and who opened or viewed the document. It is also possible to revert to an older version if changes were unnecessary or incorrect.

# TWO: EMBRACE METADATA

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## EMBRACE METADATA: CONNECT, FIND, PROTECT AND STORE INFORMATION

In simplest terms, metadata is data about data – information attached to a file or document, the purpose of which is to define, describe and classify that file or document. With a metadata-driven approach to ECM, the following functions become easier to perform and manage: <sup>3</sup>

- Information retrieval and consolidation
- Information ownership and access rights
- Information preservation and retention

## INFORMATION RETRIEVAL

When we use metadata to classify information, users do not need to know where they are saving a piece of information or a document. The important thing is to know something about the information itself. Whenever data or documents are saved into the ECM system, they are tagged with metadata. This makes it easy to find the information you're looking for because it's the context – not the location – that matters. From the user's perspective, metadata enables information and documents to be found more efficiently because they can search for information in a way that suits them best. Without metadata, it's anyone's guess if either (or both) will find the information they are looking for given that they are searching for the same document, each using different queries. When documents are tagged with the correct metadata, that single document can be found in multiple ways, rather than having to search several folders for a document.

Information Consolidation Overlapping systems create problems. They are essentially islands of information stored in and supported by specialized – often redundant – applications and operations. With a metadata enabled ECM, an organization can consolidate information from

disparate overlapping systems into one centralized, normalized repository. Consolidation is more than just connecting and enriching information across multiple systems. Consolidation and repackaging of information means users find the single version of a file they need, rather than the same file with twenty different filenames.

## OWNERSHIP, ACCESS RIGHTS, PRESERVATION & RETENTION

A metadata-based ECM system enables permissions based on user roles so that, if necessary, the access rights to specific documents can be restricted. In such cases, permissions management is not based on a folder structure but on metadata. Dynamic access permissions are automatically created based on the user's position in an organization. For example, the role of "manager" enables the person to access information related to the manager's subordinates. If the role changes, the access permission also changes automatically. You don't have to worry about adding access rights to specific folders for a specific person separately as the access logic handles the permission changes. Additionally, it's also possible to add access permissions along with editing and viewing rights for individual documents, if necessary. Metadata-driven permissions and the associated audit trail and event log also help organizations prove that they follow the access control policies the organization has defined. Automatic notifications and updates reduce the risk of maintaining and accessing outdated documents, like old contracts. Notifications on outdated documents also make it easier to get rid of outdated information.

# THREE: IMPROVE COLLABORATION

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Collaboration features ensure that there is only one correct version of a document in use – no duplicates or outdated versions. Simpler document editing and approval.

## ENSURE SMOOTH COOPERATION WITH COLLABORATION FEATURES

Business is driven by people – people that work together on teams to complete projects. An intelligent information management system makes it easy for people to collaborate, not cumbersome. In fact, the collaboration features of advanced ECM systems extend beyond the confines of the organization; multiple people, such as the

company's personnel, partners, subcontractors and suppliers can collaborate to work together more efficiently. And when the ECM system includes robust co-authoring features, users can create and edit content together, at the same time.

Furthermore, email file attachments become obsolete. Users can simply email a link to a document that can be viewed and edited by internal and external users. In addition, workflows can be attached to documents to ensure that the information is accurate as the review and approval process unfolds.

# FOUR: CONTROL RISKS

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With an advanced intelligent information management system, role-based access permission management reduces the risk of information falling into the wrong hands.

ECM systems are often sought out by organizations to help them comply with certain laws or standards. However, this is just one way that an ECM platform delivers value. The more advanced ECM systems can be used to fulfill the requirements, for instance, of various ISO standards as well as to manage other risk factors in a company. One of those risk factors is security breaches, which can result from a several inefficiencies – like (1) the use of old-school paper documents, or (2) file sharing (or storage) applications that are not ideal for maintaining strict compliance.

## THE PROBLEM WITH PAPER DOCUMENTS

While it's true that many organizations could benefit from documented instructions for saving, using and sharing information, vulnerabilities can be significantly diminished by digitizing paper documents and by using ECM systems.

Popular file-sharing services can present security risks, including unauthorized file sharing. But employees often turn to these applications for several reasons – not the least of which is that the tools provided by their companies to enable them to find and share files just aren't sufficient. With a more advanced intelligent information management system, role-based access permission management, for example, reduces the risk of information falling into the wrong hands. At the same time, continuous developments in data protection legislation also require companies to operate with more precision and have procedures for processing sensitive data. ECM systems can be implemented to fully support these procedures.

# FIVE: AUTOMATE YOUR BUSINESS PROCESSES

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ECM workflows (for invoice or contract approvals, for example) also support work efficiency and risk management. They can be used to describe and automate certain processes within the organization to ensure consistency. For instance, with automated workflows, an invoice progresses through the approval process automatically - in accordance with a pre-defined procedure from one approver to the next, without any manual work involved. This minimizes human error and expedites workflows. Further, workflows

enabled by IIM systems don't rely on paper copies, scanning, physical signatures to approve - which can be a mess to track and execute. Process and workflow management are at the core of intelligent information management systems, and often include notification capabilities informing individuals of documents to review. Users always have visibility of the current state of an invoice, or other document, within the workflow. Thus, the process is streamlined, less error prone, and auditable.

ECM workflows can also be used to set and monitor training and learning requirements for employees, allowing organizations to take control of risk management in areas such as occupational safety. Imagine, for instance, a machining company acquires a new piece of equipment which can be dangerous if misused. The company may require applicable employees to read the user guide and safety guidelines. With an ECM, the company can see at a glance if those employees have read the required information.

# SIX: CHOOSE A USER-FRIENDLY MOBILE SOLUTION

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## CHOOSE A USER-FRIENDLY SOLUTION – ACCESSIBLE ANYWHERE

Concentrate on evaluating the following features of ECM systems from the end-user's perspective. This will expedite adoption and ensure a higher return on your investment.

### CONSISTENT, FAMILIAR USER INTERFACE:

Regardless of the selected system, deployment method or device in use. This helps users get acclimated to the system faster as they are not presented with anything that is completely unfamiliar.

### A METADATA-BASED SYSTEM:

Makes information easy to find. This enables each user to search for information in the way that is most intuitive to them as an individual.

## FEATURES ENABLING MOBILE USE:

Guarantee that information is accessible on all devices. A native mobile app also reduces the use of external file sharing applications and minimizes risks.

## FUNCTIONS ENABLING COLLABORATION:

Internal and external parties, such as updating the most recent information and sharing it on mobile devices, makes cooperation and teamwork easier and more efficient, even with partners outside the organization.

## MULTIPLE LANGUAGE VERSIONS:

Allow organizations to drive stronger adoption: native language is widely preferred by users.



# SEVEN: FOCUS ON EASY DEPLOYMENT

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The last thing an organization wants is to invest in a system that's supposed to make their lives easier but find it's terribly challenging to implement and deploy. ECM deployment is simplified if the system can be implemented in phases, if required, to ensure that the process does not become a massive IT project for the organization right from the get-go.

## ON-PREMISES, CLOUD OR HYBRID?

As with many software solutions, intelligent information management systems can be on premises, cloud-based or a hybrid of those two. The popularity of cloud services today is based on ease of use: the latest versions of software are available immediately, updates take place automatically, and

using a mobile application of the platform is simple and easy. This holds true for ECM systems as well.

A hybrid approach enables companies to combine the reliability of on-premises with the flexibility of the cloud. Sometimes organizations are required to store certain types of data on-premises – either for compliance or security reasons. Hybrid deployment offers them the flexibility to store data wherever it needs to be – on-site or in the cloud – without being restricted to one or the other. It is also easy to transition to the cloud entirely if this becomes necessary later. Choosing a hybrid solution offers a way to retain cost efficiency regarding investments that have already been made.

# EIGHT: ENSURE SCALABILITY THROUGHOUT THE BUSINESS

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Because business change and growth are inevitable, an ECM system must have the flexibility to accommodate evolving needs.

To accommodate change, a single information management solution should be able to address all the business requirements of an organization including:

- Document management
- Project management and project document management
- Sales document management
- Collaboration
- Case management
- Contract management
- Quality management and compliance
- Training and competence management
- HR document management

# NINE: MANAGE INFORMATION INTELLIGENTLY

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Information management has experienced significant advancements over the past decade, but organizations are still having problems keeping up with growing volumes of content.

The good news is that the ECM market offers sophisticated intelligent information management approaches that are repository-neutral: where information is stored will not matter. And although it may reside across multiple systems, it will be accessible via a single user interface. As such, information no longer needs to be migrated from one system to another. This will save businesses significant time and money and eliminate the need to disturb existing IT infrastructure.

An AI driven ECM systems will be able to offer automated metadata suggestions that streamline workflows, including the capability to interpret unstructured data through natural language processing and understanding as well as machine learning. These kinds of powerful features will also pave the way to a future in which information management will no longer be labeled as "just another system," according to AIIM. Instead, ECM providers will be increasingly focused on outcomes. We are moving to an era in which the number one goal of ECM is to deliver intelligent solutions and strategies that help end user organizations manage the complex interaction between people, processes and technology.<sup>4</sup>

# TEN: DO YOUR RESEARCH - REVIEW ANALYST REPORTS

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## REVIEW LEADING ANALYST REPORTS

As you move forward with your selection process, do your due diligence and review leading analyst reports on ECM vendors. We recommend checking whether your vendor candidates are included in reports assessing content and information management platforms like:

- **Forrester Research:** Forrester Wave™ - Enterprise Content Management Business Content Services
- **Gartner:** Magic Quadrant for Content Services Platforms
- **Nucleus Research:** Value Matrix for Enterprise Content Management (ECM)

We also recommend requesting genuine ROI calculations to support your decision-making. This will enable you to compare the advantages and disadvantages of your shortlisted ECM platforms in accordance with your organization's selection criteria.

## SOURCES

1. IDC: "The High Cost of Not Finding Information"
2. John Manicini, AIIM: The Next Wave - Moving from ECM to Intelligent Information Management
3. M-Files: Whitepaper - Metadata: The Foundation for Next Generation Enterprise Content Management.
4. John Manicini, AIIM: The Next Wave - Moving from ECM to Intelligent Information Management



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