

OPERATIONAL SUPPORT AND CONTENT



RECENT SURVEY BY MCKINSEY & COMPANY

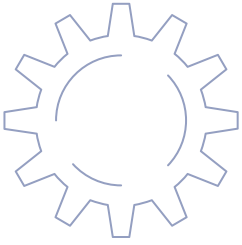
The vast majority of businesses (85%) that participated in a [recent survey](#) by McKinsey & Company said they accelerated adoption of digital interaction and collaboration tools in 2020. And a significant majority (67%) also reported that they had accelerated deployment of automation and AI solutions to stabilize processes and limit reliance on human intervention.

Although it's easy to attribute this new approach to a time of unprecedented upheaval, this shift is not new—it's simply an acceleration of new work models that have been emerging for a decade now. And it's not going to go away as the global pandemic fades. The number of companies stating that they will continue to allow remote work after safety protocols no longer require it has nearly doubled over the span of a year.

The result? "People are working differently if they're working from home, and they can feel disengaged if they don't have the personal interaction and access to the information they're used to," says Lee Van Cromvoirt, Senior Product Marketing Manager at OpenText™. "The onus is on organizations to provide an infrastructure that drives productivity through better-connected people, content, and systems. Performance across the value chain—accompanied by reduced costs and improved customer satisfaction—has a real opportunity to increase with the right steps."







Here's a simple example: An existing content management platform implements content services applications to integrate with Salesforce and SAP. With centrally defined rules, the content and data in both systems are analyzed and metatags are applied at the item level. Relational context can now be created: Data related to a customer in SAP can be linked to that same customer's content in Salesforce. Almost right out of the box, SAP data can be automatically retrieved and surfaced in Salesforce when a customer service representative opens a customer's file—all under the oversight of governance rules that define which data the CSR can see and what that person is allowed to do with that information.

Now expand that out to also include something as ubiquitous as the Microsoft Office 365 suite or any variety of other leading applications, and you can see the effects start to blossom. Remote sales and service workers can log into the system of their choice and automatically receive accurate, relevant information drawn from across the enterprise to support their exact activities.

"An effective integrated content management system can be the difference between a content browser and a content manager."

Now, Not So Often, Rarely, Not So Often, Rarely, Not So Often, Rarely, Not So

In the not-so-distant past, enhancing content usage for sales and service may have simply meant providing access to static documents on handheld devices to sales teams in the field. The events of 2020 introduced a whole new level of challenges and opportunities, spotlighting the need for more content automation and dynamic information flows that give workers better context and insights across end-to-end business processes.

In today's environment, the question for sales and service departments becomes "How can we provide better customer experiences and be more competitive?"

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Ideally, enterprises should integrate content management capabilities with the systems their people work in every day. That should include all the heavy hitters such as Salesforce, major ERP systems, and productivity suites such as Microsoft Office 365 and Microsoft Teams. It's the only way to ensure that sales and service teams can see the whole picture when it comes to their customers and the products they support across the entire enterprise.

Today's sales professionals work in multiple ways, requiring personalized methods of managing critical documents, accessing supporting information, and sharing that information with stakeholders and customers. And that means that document repositories with only rudimentary connections to business applications often can't keep up. "Improving governance—getting arms around all the information across the organization—and giving, for example, the sales organization a place to capture, access, and manage information from one spot are vitally important," Van Cromvoirt says.

Integration such as this also gives users the seamless ability to automatically access content on demand inside one system. Information can be surfaced for them while processes are happening in real time. Removing the need to search for missing pieces of the puzzle now gives sales and service professionals a powerful new edge—promoting heightened situational awareness, increased productivity, and better collaboration capabilities when engaging customers and partners.

An integrated content management platform can also help organizations:





