



Optimize Sales and Service Operations to Master Modern Work

Rethink how enterprise content management (ECM) can help sales and service teams boost productivity, shorten time to revenue, and delight customers.

The vast majority of businesses (85%) that participated in a [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? "Now more than ever before, people are 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."

New Modern Workplace Realities, New Sales Enablement Opportunities for Content Management

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?"

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 information governance to decrease costly risks means getting your arms around all the relevant content from across the organization. Giving, for example, the sales organization a place to capture, access, and manage information from one spot enables the business to make smarter and faster decisions," Van Cromvoirt says.

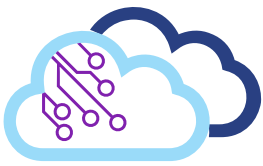
Integration such as this also gives users the seamless ability to automatically access content on demand inside one system. Information can be surfaced for them while processes are happening in real time. Removing the need to search for missing pieces of the puzzle now gives sales and service professionals 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:

- n Retain more customers, thanks to integrated contracts, support documents, and customer records that provide a 360-degree customer view, enabling sales and service departments to provide a better customer experience
- n Remain competitive through streamlined bidding and contracting processes that shorten times to completed deals
- n Optimize the sales organization with integrated marketing materials and collaboration tools that put answers at the fingertips of agents working with customers
- n Bring together global, disparate teams

Getting Started: The Path to Sales and Service Excellence

Although one of the strengths of an integrated ECM system is its ability to scale across all enterprise functions—connecting people, content, data, and tasks—organizations shouldn't try to do it all in one step. History has shown that that's a recipe for scope shift, decision paralysis, and missed expectations. Instead, start with a single, achievable use case with an easily definable scope to demonstrate success, keep costs manageable, and build the case for further implementation. "We tend to see customers start with a reason



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An integrated ECM system can enable a contract to be visible to multiple departments during sale negotiations and service activities. For example, a U.S. hardware/software company uses content services applications to share statements of work and financial documents generated by the sales department with service teams in the field. This eliminates duplicate records, helps keep projects on track, and ensures compliance with agreed-upon terms. Integration through content services applications can also boost call center efficiency.

Organizations in highly regulated industries such as healthcare or finance might start their integrated content management deployment in areas where compliance is a concern. "Integrating content services applications with existing ECM mitigates risk by extending governance policies to the majority of content and data across the enterprise," Hennicke notes. For example, an integrated ECM system can control who has access to what documents, while keeping an audit trail of who opens, reads, modifies, or shares them—and when—in turn assisting with compliance reporting.

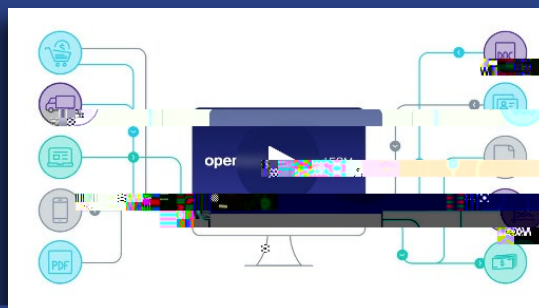
Cutting Through Complexity

Digital transformation has accelerated as more organizations adapt to the need for increased agility and resilience in response to rapid changes in the business climate. The rapidity of change is unlikely to abate anytime soon, driving the need for more people to collaborate and make decisions with the help of more information from more places than ever.

Organizations that don't adapt quickly enough risk getting left behind. Even as they adapt, enterprises must keep their sales and other departmental users productive while generating more business and keeping customers happy. These realities call for new content management capabilities—capabilities provided by content services technology.

Transitioning to a fully integrated content management framework doesn't have to be complicated. Advancements in cloud-based technologies give organizations more options critical to faster line-of-business digital transformation, all while providing the flexibility and scalability required to fit the unique needs of any organization. Sales operations, for example, can benefit from system integration almost immediately, since users don't have to learn new software, yielding benefits for users and the enterprise as a whole from day one.

That's especially true for organizations with one or two pieces of the complete integrated ECM puzzle already in place, as Van Cromvoirt explains: "For organizations undertaking digital change, if they have just the Salesforce piece and are looking to replace a legacy content services platform, the Extended ECM Platform from OpenText can start returning results quickly."



by
watching "A day in the life
of a Sales Professional"

