

# CONNECTING PEOPLE TO CONTENT

## An Overview of APQC Best Practices Study Findings



In many ways, the field of enterprise content management faces more daunting challenges than ever before. Along with the proliferation of traditional document types, employees are increasingly generating new forms of content, from wiki articles and social media conversation threads to graphics-rich presentations and YouTube-style videos.

The volume of content presents logistical concerns in terms of storage capacity, but it also poses larger questions. For example, what types of content are easiest for employees to use and learn from? What are the best tools to help people find what they need among a broad range of sources? How can people differentiate authoritative content from unverified ideas and suggestions published by colleagues? And how can organizations maximize the value of their content by delivering targeted recommendations directly to employees in the context of their work?

Seeking answers to these questions, APQC surveyed 500 professionals about all aspects of their organizations' content management programs in early 2014. One of the survey questions focused on the big picture: How effective are enterprise content management systems in terms of surfacing relevant

content and enabling employees to find and access what they need?

We didn't expect people to tell us that their organizations' content management practices were perfect, but we were surprised by the dismal picture painted by the responses. Less than one in four participants rated their organizations' content management as effective, whereas 43 percent said their firms were minimally or not at all effective at managing enterprise content.

The results were even more illuminating when we asked respondents *why* their organizations were less than effective at content management. Relatively few—approximately one in five—cited poor technology as the root cause. Instead, the vast majority said their biggest challenges were change management and organizational structure and accountability (Figure 1). In short, employees weren't following the processes in place to manage content, or the organizations had not defined sufficient ownership models for the tools and approaches.

After reviewing these results, APQC launched its second comprehensive Best Practices Study on content management in May 2014, the results of which are encapsulated in the *Connecting People to Content* report. The research aimed to investigate how organizations:

- ♦ adapt to new forms of content and technologies for delivering information;
- ♦ leverage metadata and search capabilities to surface relevant content on demand;
- ♦ integrate content into processes and applications so that it is immediately available in the flow of work;

## *Challenges Preventing Organizations from Achieving Effective Content Management*

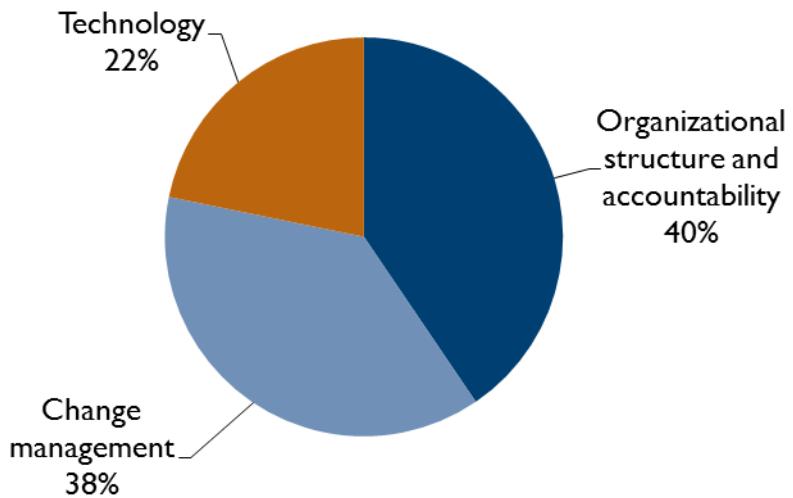


Figure 1

- ◆ engage communities of practice and social networks to source, circulate, and provide continuous feedback on content; and
- ◆ manage the end-to-end content life cycle in order to minimize redundancy and ensure employees can trust the available resources.

Over the course of the study, APQC and the 10 organizations sponsoring the research examined content management practices at five best-practice organizations. The study team identified many positive attributes of the best-practice programs, but one unifying characteristic is how attuned the content teams are to the needs of content stakeholders and end users inside their organizations.

The best-practice organizations thoroughly understand their target audiences for content, and the result is that their tools and processes align with how people want to contribute, access, share, and reuse organizational knowledge.

The Research Champion for this study, St. Charles Consulting Group, distilled this and other related concepts into a five-level maturity model (Figure 2) describing how organizations connect people to content.

The vast majority of organizations say their content management challenges center on change management, organizational structure, and accountability.

## Maturity Model for Connecting People to Content

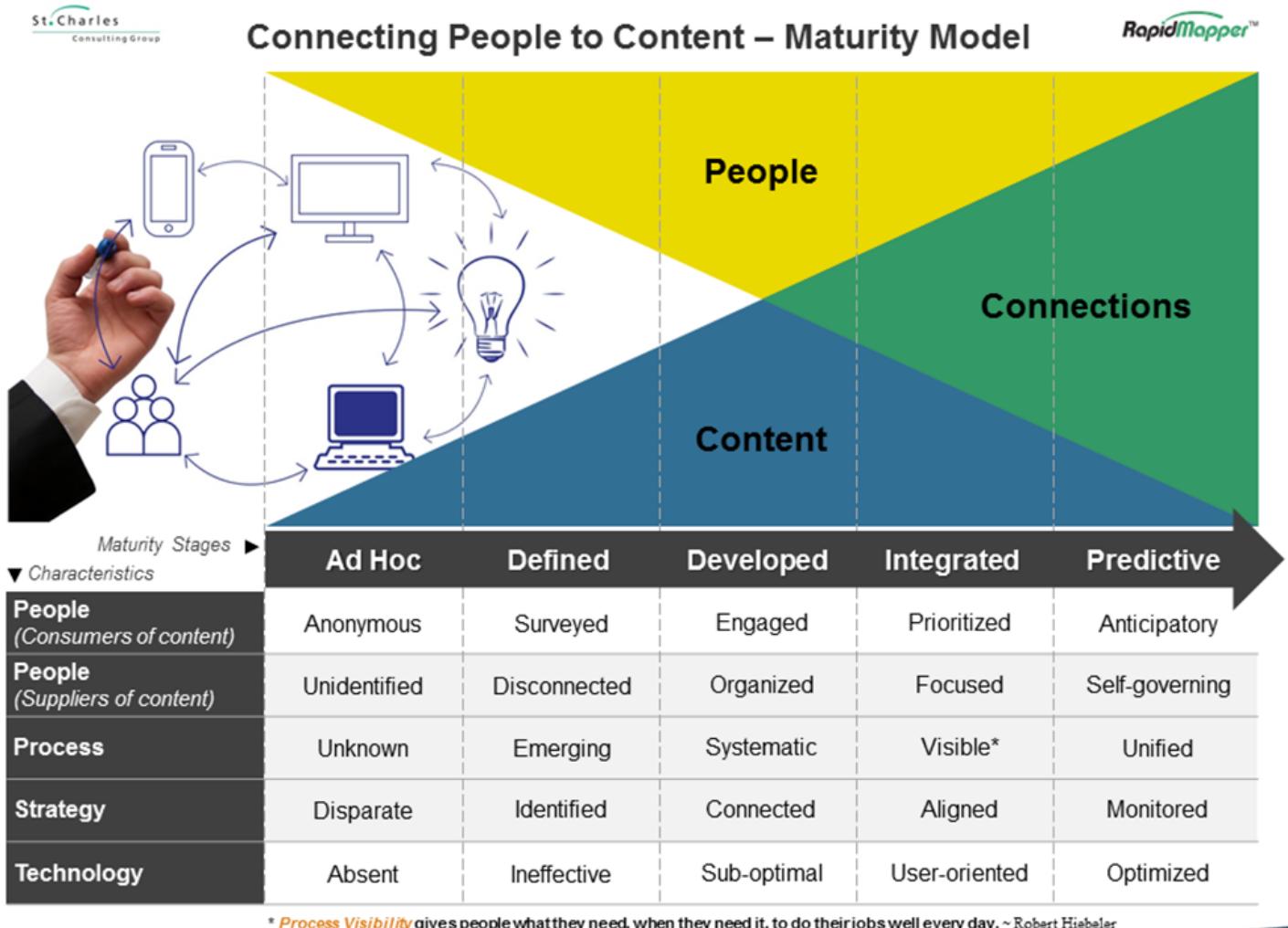


Figure 2

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The model includes technology as an enabler, but the bulk of the attributes focus on people- and process-related tactics to engage employees, solicit content, and link people to available resources. As an organization hones its strategy and processes in alignment with suppliers and consumers of content, it is able to connect supply to demand, enabling meaningful connections and generating business value.

We suspect that few organizations will ever reach the pinnacle of maturity on St. Charles Consulting Group's model, which denotes a fully integrated content environment capable of anticipating content consumers' needs, focusing content suppliers on those needs, and seamlessly delivering content via unified processes and optimized technology. However, our hope is that the findings described in the *Connecting People to Content* report will help readers advance their content management programs toward more aligned strategies, systematic processes, and user-oriented technologies for content contribution, classification, distribution, and sharing.

# THE BEST PRACTICES

As part of this research, the study team identified 20 best practices associated with enterprise content management and sharing. These practices, categorized by theme, are listed below. Additional details on each along with supporting examples from the best-practice organizations can be found in the full report.

## DEVELOPING A STRATEGY TO CONNECT PEOPLE TO CONTENT

- 1. Position content as a strategic asset, and tie its creation and use to business goals.** The best-practice organizations make explicit connections between how employees interact with content and the overall performance of the business.
- 2. Clearly distribute accountability between those who own content-related processes and systems and those who own the actual content.** The best-practice organizations have massively different approaches to staffing and resourcing their content management programs, but they are unified in defining explicit roles and responsibilities for both content teams and suppliers and consumers of content out in the business.
- 3. Design the content strategy around stakeholder needs.** The best-practice organizations clearly define the internal and external audiences for content and then base decisions about content management processes, tools, and improvements around the needs of those audiences.

## CREATING CONTENT PEOPLE WANT

- 4. Align the type and format of available content to the intended audience.** The best-practice organizations design their content to meet the preferences of an increasingly young, impatient, mobile, and collaborative work force.
- 5. Create specific roles or processes to identify content gaps.** Based on the content needs and demographics of their work forces, the best-practice organizations rely on subject matter experts or defined processes to surface gaps in existing content.

## MANAGING THE END-TO-END LIFE CYCLE

- 6. Establish distinct channels for vetted and unvetted content.** The best-practice organizations ensure that employees can distinguish authoritative content they can trust from informal community- and user-generated content, which helps people decide how to use the various resources.
- 7. For content contributions, balance metadata requirements with the need for a streamlined user experience.** The best-practice organizations recognize that content needs to be tagged so that it can be found, but—where possible—they streamline the process by leveraging auto-populated or standard metadata.
- 8. Maintain strong accountability for content review cycles, and don't hesitate to dispense with materials of questionable value.** The best-practice organizations prevent clutter from outdated content by assigning clear ownership for content and repositories, establishing fixed review cycles, and disposing of content that has not been updated or used in a given timeframe.

9. **Use technology migrations as an opportunity to clear out outdated content.** Although it is often possible to migrate huge volumes of content to new systems, many best-practice organizations take a more thoughtful approach, asking teams and departments to review content and migrate only the newest and best materials.

## ENSURING CONTENT IS FINDABLE AND ACCESSIBLE IN THE FLOW OF WORK

10. **Create taxonomies and organizing frameworks that reflect how users think about content.** User engagement helps build employee buy-in for taxonomies, and it ensures that taxonomic terms and relationships represent the way information is actually used throughout the organization.

11. **Use scope, metadata, and manual curation to ensure that search functions return the most relevant results.** On average, the best-practice organizations do not have significantly better search technology; however, they meet the searching needs of employees through sound decision making and effective process management.

12. **Monitor analytics to enhance search results and content recommendations.** The best-practice organizations track what employees search for and how they interact with content to optimize search and push content directly to users.

13. **Integrate content into business applications and processes.** The best-practice organizations make content easily accessible by building it directly into process documentation, project sites, and software applications and creating links and customized alerts.

14. **Provide mobile apps to connect people to content through smartphones and tablets.** Four of five best-practice organizations have dedicated enterprise mobile applications and work to ensure that content is accessible, readable, and secure on mobile devices.

## INTEGRATING CONTENT AND SOCIAL CHANNELS

15. **Use communities and social networks to surface needs, incubate content, and make recommendations.** When employee needs bubble up on social channels, the best-practice organizations prioritize the creation (or clarification) of content to meet those needs.

16. **Combine people and content search in a seamless environment.** Employees inevitably encounter problems that content alone cannot solve, at which point they need to reach out to experts. The best-practice organizations make finding relevant expertise easy by combining content search with expertise location.

## MANAGING CHANGE AND EVALUATING SUCCESS

17. **Train employees to be better searchers and consumers of content.** The best-practice organizations recognize that searching an enterprise system is different than using a consumer search engine and requires a unique skillset.

18. **Measure engagement with content and the user experience.** The best-practice organizations track the health of their content management approaches by measuring how many people are using them and how satisfied they are with what is available.

19. **Use metrics as conversation openers.** The best-practice organizations leverage data as a clear, visual way of guiding conversations with senior leaders, content owners, and communities.
20. **Find a way to measure—or at least demonstrate—the value provided by content.** Some best-practice organizations calculate the value or ROI from content management in order to show business impact.

## THE BEST-PRACTICE ORGANIZATIONS

Below are brief overviews of the five best-practice organizations that participated in this study. More details on each organization and its respective strategy for connecting people to content can be found in the full report.

### EY

EY is a global audit, tax, transaction, and advisory services firm. The firm competes in a market where insights are the product, so content is a key business differentiator. EY's content management strategy focuses on bringing relevant, impactful, and meaningful content to EY's people for them to be successful and directly to the market to support exceptional client service. The content management team uses a disciplined approach to continually engage with business stakeholders across EY's multiple service lines to see how they are doing, learn whether any priorities have changed, and mine intellectual capital.

EY is currently in the process of moving to Microsoft SharePoint as the mainstay of its content sharing capability. The firm looks at the migration as an opportunity to optimize its content by establishing a formal content management life cycle, maximizing findability through a single metadata structure for internal and external content, and using metrics and status reporting to ensure that the content strategy remains on target.

### METLIFE

MetLife is a global provider of life insurance, annuities, employee benefits, and assets management. This study looks at content management practices in the customer service, operations, and group underwriting organizations within its group, voluntary, and worksite benefits line of business. MetLife aligns content with strategy by embedding KM and content solutions in strategic initiatives at the enterprise, line of business, and business-unit levels. KM is a key element of initiatives and projects, just like training and change management, said Director of Knowledge Management Robert Burns.

The customer service, operations, and group underwriting part of the business uses OpenText's Livelink as its document management system. For knowledge exchange, it uses intranet sites along with Microsoft SharePoint. The organization has a central KM team that is responsible for delivering the right content to the right people at the right time. The KM team works with other roles (including knowledge champions, knowledge coordinators, and knowledge owners) to manage content. The KM team tracks a range of indicators to assess its content management efforts, including project value, efficiency gains, and quality. MetLife also has a closed loop process whereby metrics, value, and feedback results are analyzed and used as inputs to strategic and tactical planning. Specific improvements are created in partnership with the various business roles and the KM team.

## MWH GLOBAL INC.

MWH Global is an engineering and consulting firm focused on wet infrastructure, including water treatment, supply, and power. MWH's content management approach aims to deliver information and expertise to employees "in the flow and on the go." To accomplish this, the KM team tries to streamline the knowledge sharing experience for employees, make it meaningful by putting the right information in the right place at the right time, and help employees engage in dynamic exchanges via social tools.

Most of MWH's staff members are people with scientific, engineering, design, or technical backgrounds. The type of work that MWH does and the skillsets of its work force determine the types of knowledge content that the organization needs to manage: namely, technical templates, project templates, forms, and checklists for consulting engagements. Because its people rely on vetted, authoritative content, MWH deploys a multi-tiered approach to content management—collaborative content in its Yammer communities and project team sites is loosely governed, but content in its technical library and department portals is tightly controlled.

## NALCO, AN ECOLAB COMPANY

Nalco, an Ecolab Company, specializes in water, energy, and air applications for light and heavy industry. Nalco's business strategy involves acquiring knowledge, educating engineers and salespeople about that knowledge, and then applying the knowledge to client engagements. The organization's content management strategy emphasizes making technical information and expertise available to field personnel when and where they need it. Most of Nalco's knowledge environment—including a library comprised of expert-authored content, communities of practice, and expertise location profiles—is built on Microsoft SharePoint.

Nalco has a decentralized approach to knowledge and content management, in which a small core KM team supports a distributed network of content authors and owners throughout the business. The KM team owns the processes and approaches for content, but the business owns the actual content and is accountable for identifying gaps, authoring documents, and adding metadata and keywords to ensure users can retrieve appropriate resources. The KM team acts as a consultant by sharing usage data and search logs to help the business identify content needs and manage existing resources.

## WIPRO LTD.

Wipro is a global IT services, consulting, and outsourcing organization. The firm views content and knowledge management as key to its business strategy for delivering integrated and innovative solutions to customers and for growing and retaining its global work force. Wipro has a central KM team that includes dedicated members for content management. The team is responsible for managing Wipro's content repositories; turning employee-generated content into reusable knowledge; and interfacing with teams, business units, industry verticals, and accounts to drive knowledge and content initiatives.

Wipro's key content management technology is Microsoft SharePoint, and customized SharePoint collaboration features are in use across the organization. The organization leverages Yammer as its main collaboration platform, as well as several standalone .net solutions for different aspects of content and knowledge management. Wipro's KM team uses analytics to measure the health of its content management initiatives and to push relevant content directly to employees. Major initiatives—including gamification and mobile access to content—focus on engaging Wipro's large Millennial work force and providing learning and reuse opportunities for employees of all ages. \*\*\*

## ABOUT APQC

APQC is a member-based nonprofit and one of the leading proponents of benchmarking and best practice business research. Working with more than 500 organizations worldwide in all industries, APQC focuses on providing organizations with the information they need to work smarter, faster, and with confidence. Every day we uncover the processes and practices that push organizations from good to great. Visit us at [www.apqc.org](http://www.apqc.org) and learn how you can make best practices your practices.