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# Capture and Business Process:

## drivers and experiences of content-driven processes

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## Process Used and Survey Demographics

While we appreciate the support of these sponsors, we also greatly value our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are independent of any bias from the vendor community.

The survey was taken using a web-based tool by 493 individual members of the AIIM community between October 14, 2010, and November 3, 2010. Invitations to take the survey were sent via e-mail to a selection of the 65,000 AIIM community members.

Survey population demographics can be found in Appendix A. Graphs throughout the report exclude responses from organizations with less than 10 employees and suppliers of ECM products or services.

# About AIIM

AIIM (www.aiim.org) is the community that provides education, research, and best practices to help organizations find, control and optimize their information. For more than 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records and business processes. Today, AIIM is international in scope, independent and implementation-focused, acting as the intermediary between ECM (Enterprise Content Management) users, vendors and the channel. AIIM runs a series of training programs, including the SharePoint Certificate course.

## About the Author

Doug Miles is head of the AIIM Market Intelligence Division. He has over 25 years experience of working with users and vendors across a broad spectrum of IT applications. He was an early pioneer of document management systems for business and engineering applications, and has been involved in their evolution from technical solution through business process optimization to the current corporate-level concerns of security and compliance. Doug has also worked closely with other enterprise-level IT systems such as ERP, BI and CRM. Doug has an MSc in Communications Engineering and is an MIET.

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# Introduction

Over the years, we have charted a slow but steady increase in the number of organizations transitioning from basic scanning of paper documents for archive, to the more sophisticated recognition and capture of multi-format content as input to business processes. We have frequently recorded a strong return on investment performance from these scanning and capture projects, but, as evidenced by this year's results, there is a considerable variation in levels of adoption and maturity across this increasingly broad spectrum of activities.

In this report, we set out to measure the investment drivers in more depth, looking at various capture strategies, including outsourcing. We also look at capture integration with key enterprise systems and compare sourcing preferences for business process management (BPM) products and modules.

## Key Findings

■ The strongest driver for scanning and capture is improved searchability and knowledge sharing across the business, followed by productivity improvements, reduced office costs and better customer service.

■ 66% of responding organizations have a formal scan-to-archive process, and 47% utilize some form of workflow, but only 16% scan and extract data to a process. When scanning to archive, only half use automatic recognition of metadata for indexing.

■ 39% of responding organizations reach positive payback on their investments in scanning, capture and BPM within 12 months, rising to 60% within 18 months. Automatic document classification shows a particularly high return for the 19% of respondents utilizing it.

■ Improved process productivity and process quality produce significant financial savings, but respondents were as likely to cite better knowledge sharing and access as providing significant financial return.

■ The consumption of paper and number of photocopies is still growing in 27% of responding organizations, but in 39%, it is finally starting to fall. Amongst those organizations with more extensive and mature scanning and capture operations, 53% are seeing a reduction in paper usage.

■ 61% of respondents are processing scanned images, 30% are processing electronic Office files and emails, and 26% are processing faxes for data capture prior to process.

■ Only 14% of organizations are using capture and BPM across multiple processes and departments.

■ Regarding forward strategies for scanning and capture, outsourcing is showing a very small net gain, whereas respondents are posting very positive preferences for both centralized and distributed capture in-house, and are making big moves towards automated data recognition and document auto-classification.

■ These strategies are reflected in a projected net rise in spend on capture and BPM software modules, compared to a more neutral projection for scanner hardware and for outsourcing.

■ 55% of larger organizations, 32% of mid-sized organizations and 22% of smaller organizations use outsourcing. Only a third of these are doing any form of data capture for process (44% of larger orgs) and only 20% are outsourcing any part of the process itself.

■ The primary driver for outsourcing is to cut costs, with the next factor identified as the need to focus staff on core tasks. 88% are satisfied with the quality of service provided by their outsourcer.

■ The most popular enterprise systems to be capture-enabled are Finance, Line of Business and HR, followed by Service, Claims and Case Processing. Generally, only half of these systems are enabled and integrated at a process level.

■ 58% of SharePoint users are not storing scanned image files and only 9% are executing any workflow or BPM with scanned images. File sizes and the ability to handle scanned image throughput are the biggest concerns.

■ 60% of respondents have one or more capture and BPM systems. Of these, 39% have a single system in use for all applications. Of those with multiple systems, 80% are looking to converge to a single system.

■ Although respondents expressed a preference to source workflow and BPM as part of an ECM suite or as part of SharePoint, the decision maker for capture and BPM is likely to be a department or Line of Business head, compared to a Head of IT or Head of Compliance for the ECM system.

■ Resistance to change, and a lack of awareness of the possibilities of BPM were indicated as the most commonly encountered management issues arising in a capture and BPM project. Difficulties of integration with other systems, and time taken to map processes, were the biggest technical issues.

# Business Drivers for Scanning and Capture

Mobilizing documents for electronic access and information sharing is the biggest driver for investment in scanning and capture. As a "soft dollar" benefit, this may not be the primary justification cited in most business cases, but once systems are installed, our users report this to be the strongest long-term benefit.

*Figure 1: What are the three strongest drivers for scanning and capture in your organization?*
*(N=418, 10+emps, non-trade)*
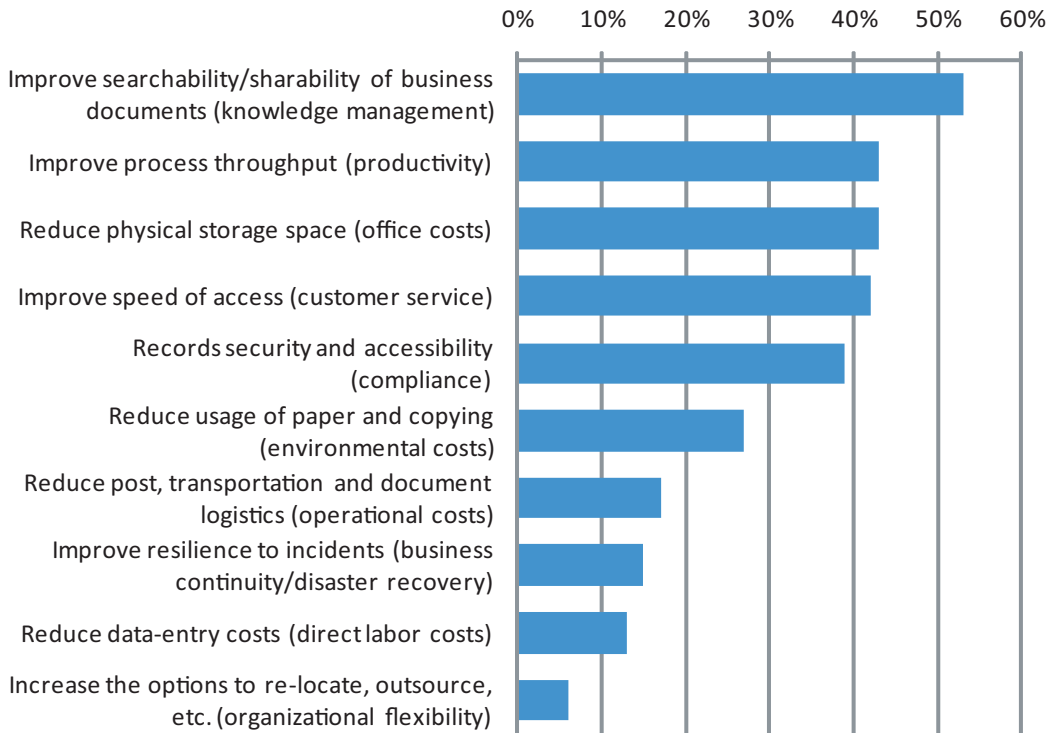


At the next level, "improved process throughput" scores much more highly than the more direct savings obtained from reduced keying for data-entry, indicating a more comprehensive improvement than that of simply removing the keying process. Reduced physical storage space is a readily quantifiable benefit, and in these days of pared down offices and hot-desking, is likely to relate as much to local office space for short-term filing, as to longer term archives - which can frequently be stored offsite in warehouses. Customer service is another strong driver, as customers expect help desk operators to see and discuss their most recent correspondence, prompting the need for some organizations to undertake daily electronic conversion of all inbound mail. Records security and compliance takes next place as the underlying impetus for most scan-to-archive projects.

Improved information access and knowledge sharing are seen as the strongest benefits of scanning and capture. When combined with the more immediate financial benefits of increased productivity and reduced office costs, this produces a win-win situation.

## Paper Reduction

As part of the drive towards a "less-paper office", both of the cost reduction benefits identified with paper usage feature in the middle of the chart (Figure 1). Less printing and photocopying is good for the environment – and saves money, of course – but reducing the logistics cost of posting and transporting paper also ranks quite highly, particularly for larger organizations.

*Figure 2: Would you say that the consumption of paper and/or number of photocopies in your organization is: (N=418)*
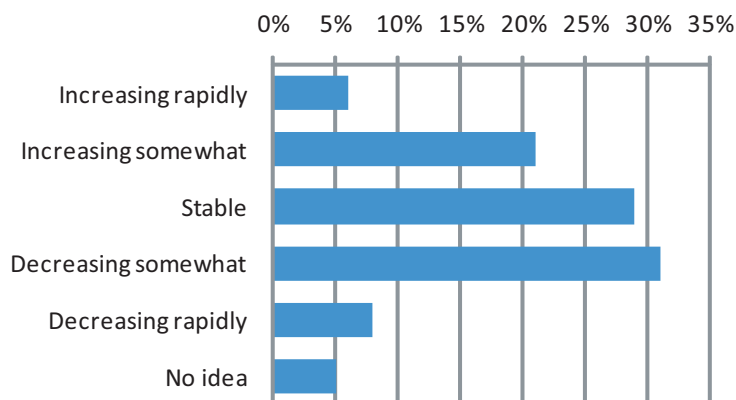


The consumption of paper and number of photocopies is still growing in 27% of responding organizations, but in 39%, it is starting to fall. This is the first time in any AIIM survey we have seen an overall net reduction in the use of paper, although in the largest organizations it is still equally balanced, with no net increase or decrease. Amongst those organizations with more extensive scanning and capture operations, 53% are seeing a reduction in paper use, reflecting their reduced dependency on paper, particularly photocopies.

## Scanner Utilization

For many years, we have highlighted the lack of awareness of the scanning function on modern copiers - now called multi-function printers (MFPs) or multi-function devices (MFDs). Ad hoc scanning is used in most offices, of course, but what is demonstrated by this survey is that 58% of organizations now make formal use of MFPs for scanning as part of a process or archive procedure.

*Figure 3: Which of the following scanner types are you using as a coordinated input to process or archive? (N=418, non-trade)*
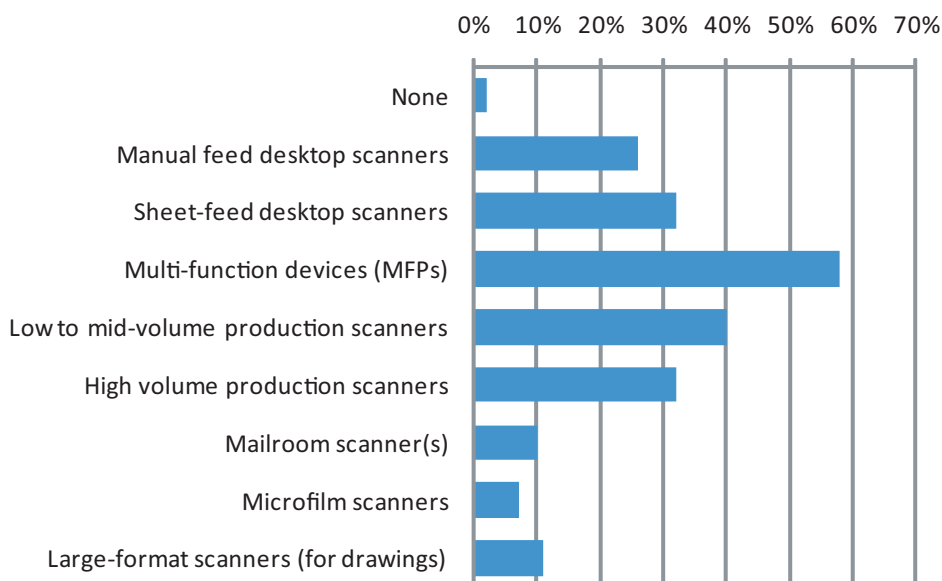
It is interesting to note that 7% of organizations still utilize microfilm scanners, and 11% own large format scanners for drawings. Mailroom scanners to support a scan-on-entry philosophy are in use by 10% of organizations – rising to 19% of larger organizations.

For the first time, we are able to report that paper use is finally starting to fall, with a net 12% of responding organizations posting a reduction.

# Scan-to-Archive vs. Capture-to-Process

Despite the fact that 82% of our respondents undertake coordinated scanning, only 16% are capturing data for use in a process, rising only to 27% even for the largest organizations. This does not necessarily mean that documents and forms are not being workflowed through processes, but that data is either being manually re-keyed, or is not fundamental to the process. Of the 66% of organizations scanning to archive, half are not using data capture to assist with indexing and are manually applying metadata, although a significant proportion are capturing full text for subsequent blanket searches.

*Figure 4: How would you describe the highest level of image capture maturity in your business unit (across in-house and outsource)? (N=418)*
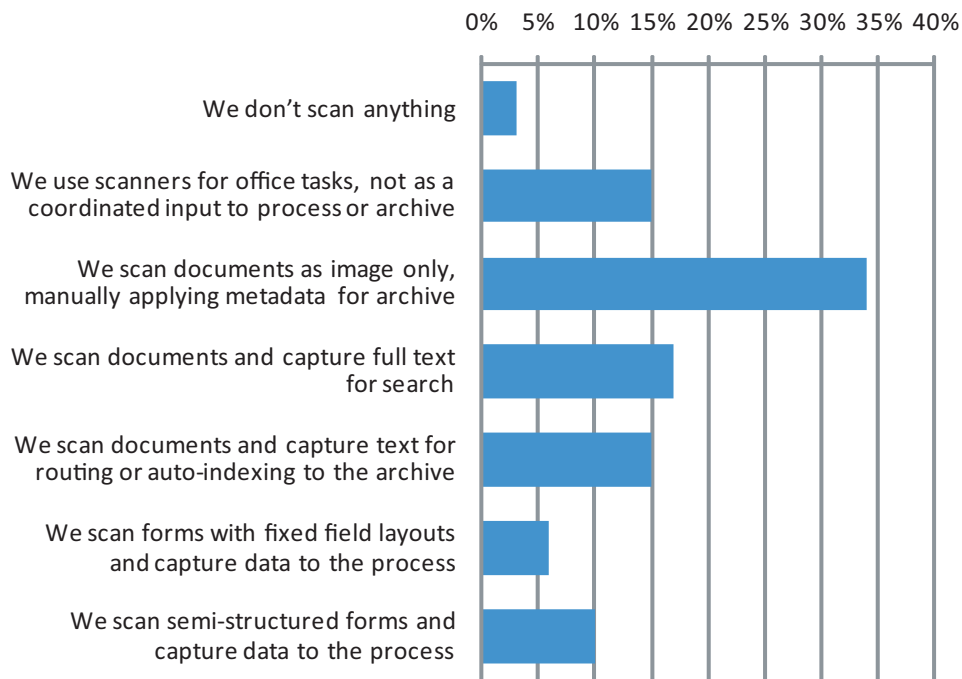


Given the ubiquity of forms used across all sizes of organization, and the returns on investment described later in this report, there would seem to be considerable opportunity for growth in the use of data capture and automated forms processing.

## Content Types for Data Capture

An important aspect of capturing documents and routing them into a process is to combine scanned paper documents with emails, electronic office documents, faxes and web forms, and pass them into the process together. Only 30% of organizations are dealing with these electronic file-types. Recognizing customer names, account numbers or order numbers is, of course, considerably easier with electronic files. Very few respondents are capturing SMS text messages or instant messages.

Figure 5: Which of the following content types are you processing for automatic capture of data?
(N=413)
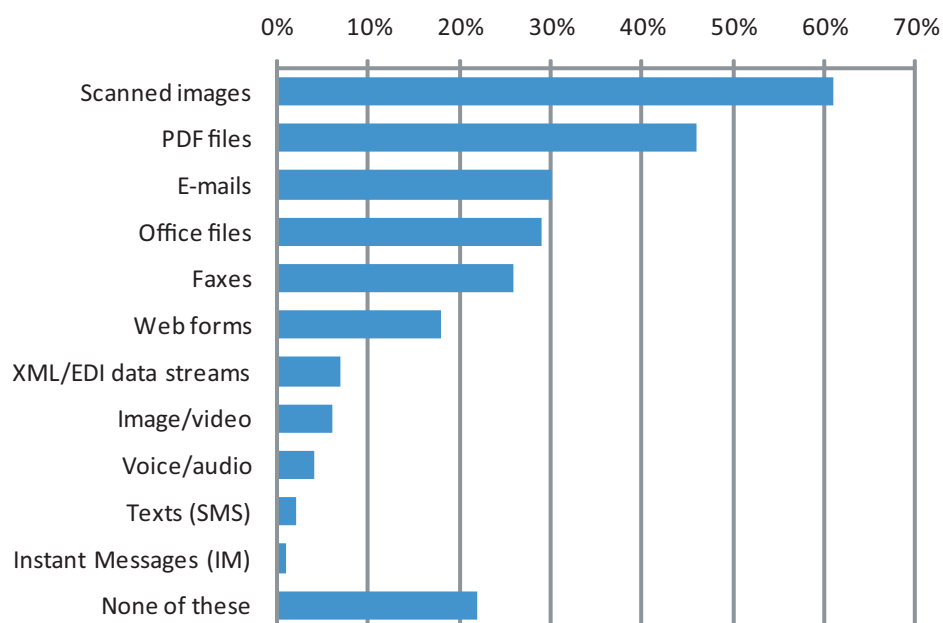


## Scanning and Capture Strategies

Improving technology has made recognition software more capable, easier to use, and cheaper. Higher bandwidth local networks allow distributed scanners to link to central capture servers over the network. Scanner-agnostic capture servers can now service a mix of central production scanners and distributed MFPs. All of these developments are having a considerable effect on the balance between outsourced scanning, centralized in-house scanning and distributed scanning.

Figure 6: How would you characterize your scanning and capture strategy?
(N=380. Shorter lines reflect "We don't do this")



■ Do Less    ■ No Change    ■ Do More
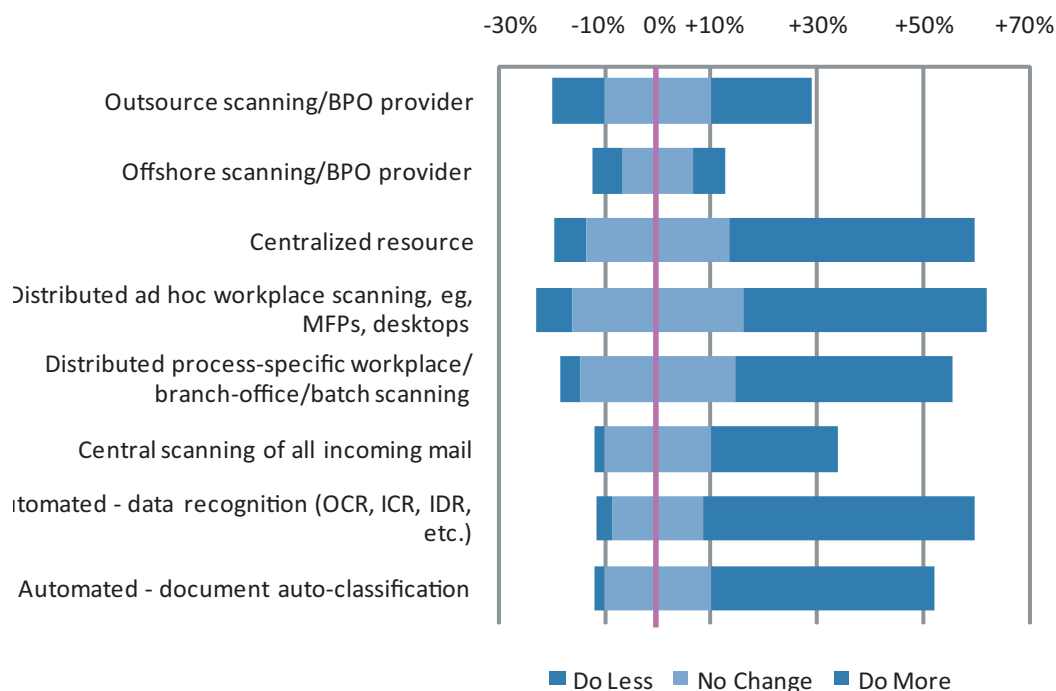
As we can see in Figure 6, there is a small net increase in outsourcing strategies, although offshore outsourcing remains neutral. Both centralized and distributed scanning, on the other hand, are showing a considerable increase in popularity, with a net of 40% intending to do more. Central scanning of incoming mail is also set for strong growth, moving from a 20% adoption to around 40% - although these responses are strategy intentions, not planned purchases.

In terms of core recognition software, most companies plan to increase their utilization considerably, and there is a strong move towards auto-classification of documents.

> In-house centralized and distributed capture are proving to be equally popular strategies, compared to a small net increase in outsourcing.
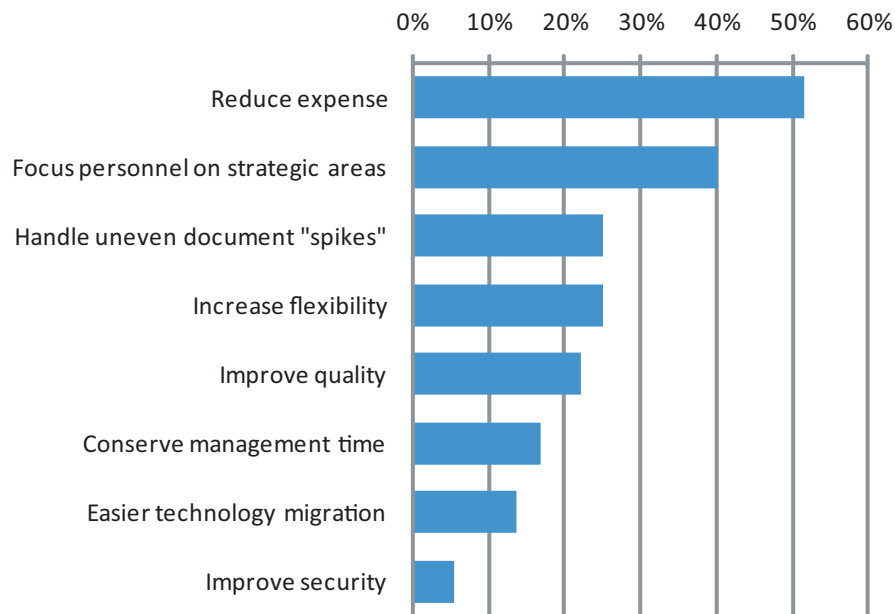
## Outsourcing

In theory, the technology changes that are driving organizations to reconsider in-house scanning and capture should be balanced by the dramatic improvement in internet capacity. This provides outsourcers with a number of options: immediate re-distribution of scanned documents back into the user's network; providing ECM and records management on a software-as-a-service basis; or assuming responsibility for more of the business process itself. With no geographical limitation to this high bandwidth, the outsourcing options move on from local scanning bureaus towards larger and perhaps better-resourced document processing (DPO) and business outsourcing (BPO) companies operating on a global scale.

*Figure 7: Which of the following would best apply to your highest level of outsourcing?*
*(N=139, excl. 253 who do not outsource)*
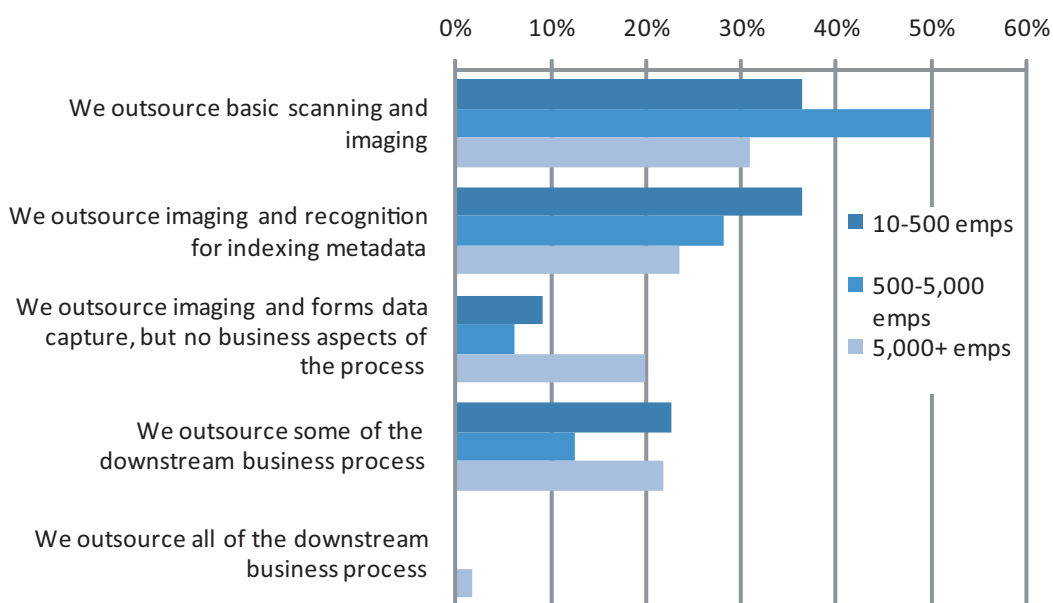


Overall, 55% of larger organizations, 32% of mid-sized organizations, and 22% of smaller organizations use outsourcing. Figure 6 shows that only a third of these do any form of data capture as part of the outsourced process, although this is much more likely with larger organizations than smaller ones. Of course, there are technical issues to consider, such as exporting data from enterprise systems in order to provide validation tables for the capture process, or providing real-time data links to internal systems. Only 20% of those who outsource scanning and capture are outsourcing any part of the business process itself. This represents a considerable opportunity for document process outsourcers (DPOs).

Figure 8: What are the two most important benefits you would expect to realize from outsourcing parts of your capture operation? (N=236, excl. 146 "Not applicable")



As might be expected, reducing direct costs is the strongest reason to consider outsourcing, followed by the less direct aspect of aligning staff functions to core activities. Of those respondents using outsourcing, 53% were somewhat satisfied or very satisfied with the service, with only 12% having issues with their current outsourcer.

Overall, 35% of organizations use outsourcing, but only a third of these do any form of data capture as part of the outsourced activity, and only a fifth are outsourcing any part of the business process itself.

## Capture and Process Integration

Capture-enabling an application generally involves the ability to scan a document into an application and store it there (or more likely hold a link to it) for future reference against an order or customer contact log. A process-integrated application might include an element of workflow that is initiated or dependent on the input of a document or form, and in many cases will involve capture of data from the form, which then produces a reference link and is utilized as part of the process. In the simplest case, customer details are captured, and an acknowledgement is sent back to the customer that their application form, order or service request has been received and is in process. Details filled in by the customer on the form may also be fed back to them as a confirmation.

Accounts payable or invoice processing is a well-recognized example of a more sophisticated capture process, where customer account numbers and order numbers are recognized and matched against the order processing system, and as a further step, line items, quantities and invoiced amounts are matched against the original order and/or the delivery note (which may also be scanned in).

*Figure 9: Which of your enterprise systems are capture-enabled, and integrated at a process level? (N=342. Shorter lines indicate "we do not have a system like this")*
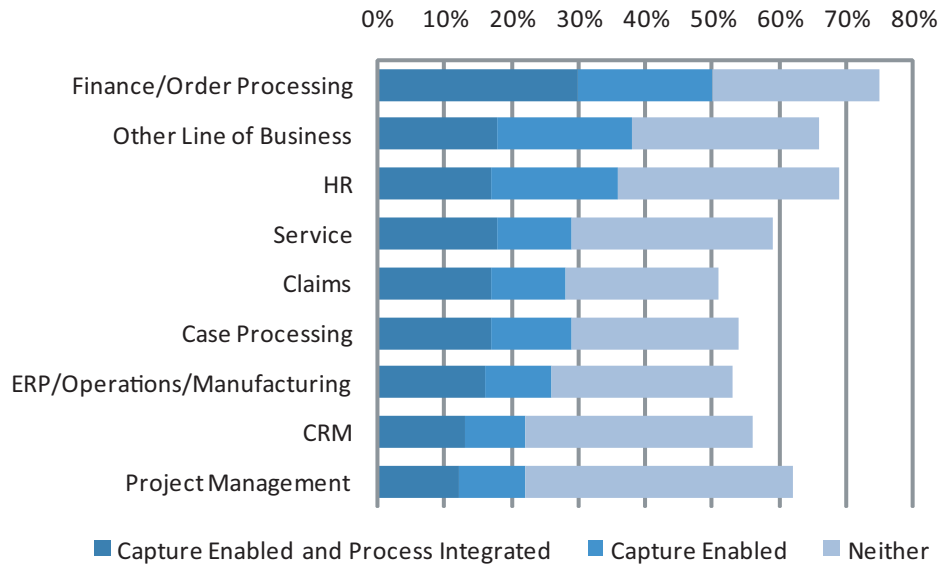


Whilst 35 to 50% of organizations in Figure 9 are capture-enabling their key processes, only about half take the extra step of process integration. Larger organizations are more likely to be integrating their systems.

## Integration with SharePoint

Unlike the majority of ECM suites, SharePoint has a very limited native capability for handling scanning and capture, and this seems to be reflected by the 58% of SharePoint users who do not include scanned image file types as documents in their own right within SharePoint.

*Figure 10: Are you using scanning and capture as an input to SharePoint? (N=179 SharePoint users)*
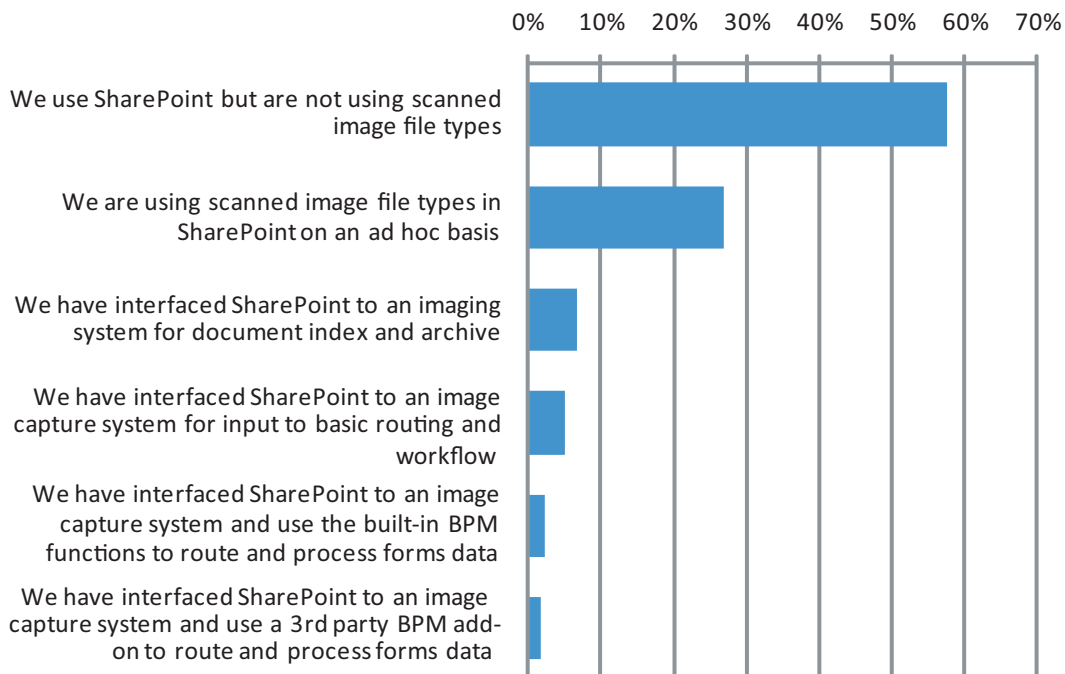
16% of SharePoint users have interfaced it to a specialist imaging system, but only 9% of users are making any use of scanned images as part of a basic workflow or BPM-enabled process. This reflects a number of concerns that users have with SharePoint's ability to handle large document image files, albeit that some of these concerns are addressed in the SharePoint 2010 release. BPM functionality is also a concern for more advanced users.

*Figure 11: Which of the following issues have arisen from your use of capture and SharePoint?*
*(N=179 SharePoint users)*
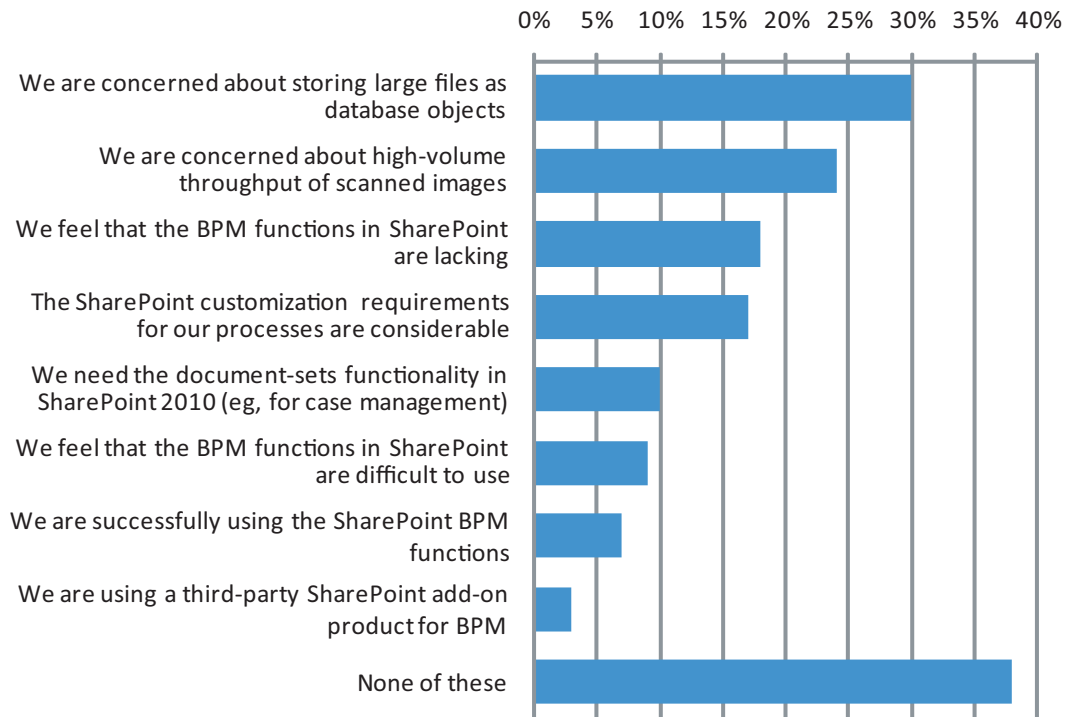


There is considerable caution about utilizing scanned documents within SharePoint, and scanned images are not generally being used as part of a BPM process.

# BPM (Business Process Management)

As we might expect, smaller companies are much less likely to have embarked on BPM projects, even for the more basic approval processes. Overall, 27% of organizations use some degree of automated routing, with 19% extending this to use extracted data to route and process content and 14% extending this capability across multiple processes and departments.

*Figure 12: How would you describe the level of workflow and BPM maturity in your business unit (across in-house and outsource)? (N=413)*
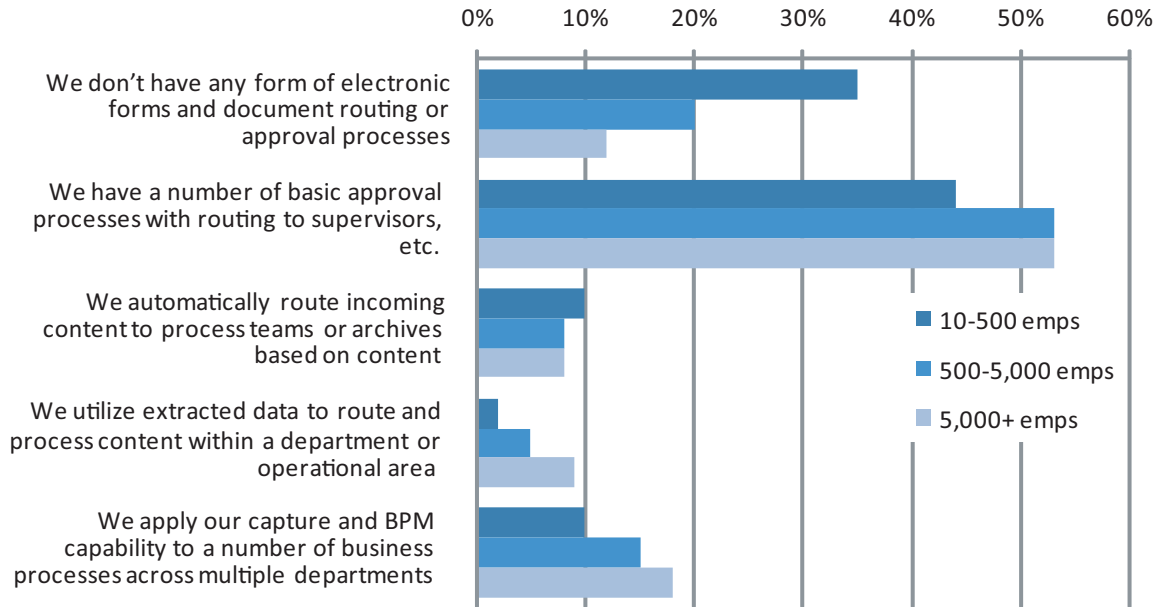


The goal of a standardized BPM approach using a common toolset is one that many organizations are striving to achieve, with 40% of BPM users planning to converge disparate systems to a single solution, particularly in the largest organizations.

*Figure 13: Which of the following best applies to your capture and BPM systems? (N=376)*
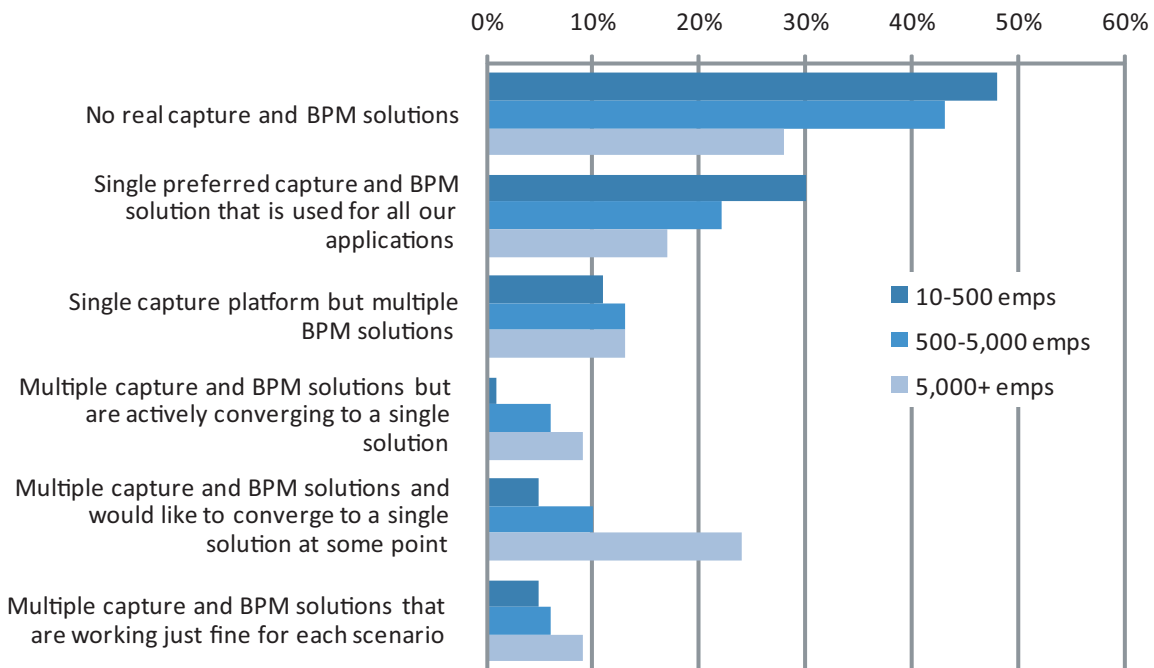
Figure 14 indicates a slight overall preference to source workflow and BPM functions within a document management or ECM system, compared to similar functions within the main enterprise applications. There is a small move away from custom systems or middleware in favor of dedicated BPM suites. SharePoint is predicted to make a strong showing in the future from its current low base, as is Open Source. It seems likely that SharePoint will be used in addition to other solutions.

*Figure 14: Which of the following systems do you most actively use or plan to use for process management and workflow? (Max 2) (N=376)*
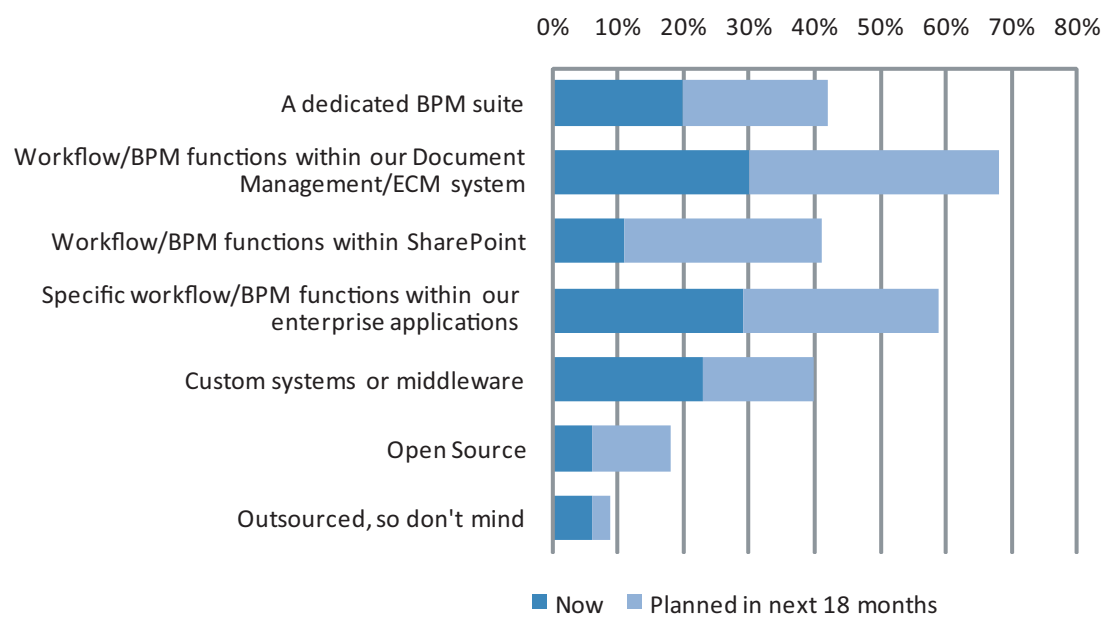


Larger organizations are keen to rationalize their capture and BPM projects around a single platform, with existing ECM suites as the preferred option.

# Management and Implementation Issues

## Decision Makers

A consistent challenge faced by capture and BPM is that the former is frequently seen as a front-end, physical handling task akin to the post room or the print room, and the latter is viewed as the province of process owners and line-of-business (LOB) managers. Further confusion arises, as the scanned documents may be part of an ECM or DM system, which is the realm of the Records Manager or Compliance Officer, or may be in the remit of the IT Department - particularly if SharePoint is involved.

*Figure 15: Who are the decision makers in your organization for the following? (N=411)*

|  | RM or Compliance | Line of Business | Doc. Production, Facilities or Operations | IT |
| --- | --- | --- | --- | --- |
| Capture | 14% | 26% | 20% | 21% |
| Workflow & BPM | 8% | 22% | 13% | 26% |
| ECM & RM & DM | 21% | 12% | 14% | 30% |
| SharePoint | 2% | 2% | 7% | 53% |

Obviously, organizations need to make a joined-up decision on this. It may be that capture and BPM projects are worth implementing initially as a point solution to solve an urgent business process issue, but this should be done with foresight as to how other content management and collaboration requirements can be drawn together further downstream, perhaps by building out a scanning and capture solution into a full ECM suite.

## Management Issues

As would be expected for any project that involves changes to long-term work processes, user resistance to change is the most prevalent issue, emphasizing the need to consult users in advance, keep them in the process definition loop and train them appropriately. The next element is the lack of understanding of what BPM is and what it can achieve. This often balances against a lack of knowledge in IT of what the company processes are and how they should be mapped. In addition, as soon as process ownership extends across departmental boundaries, the issues of cooperation and executive support are sure to arise.

*Figure 16: What are/were the three biggest management issues you experienced during the implementation of Capture and BPM? (N=343)*
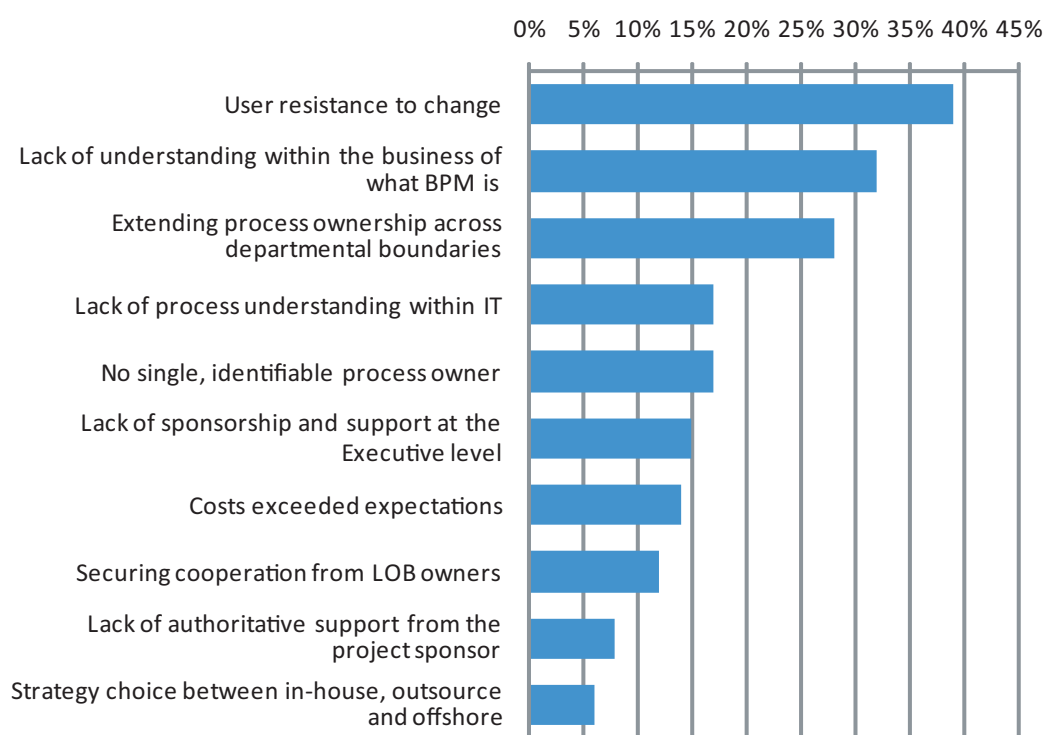


## Technical Issues

Just as departments struggle to cooperate, systems can be reluctant to talk with each other. If processes are to be automated around a document capture solution, an existing enterprise system is likely to be involved – hence the integration issue topping the list of technical problems. The next most prevalent concerns involve process complexity and the ability to map existing processes and model them onto the BPM system in a flexible and adaptable way. Another area that needs to be addressed before go live is how quality assurance at the front end will be addressed, and how manual fall-back will be handled.
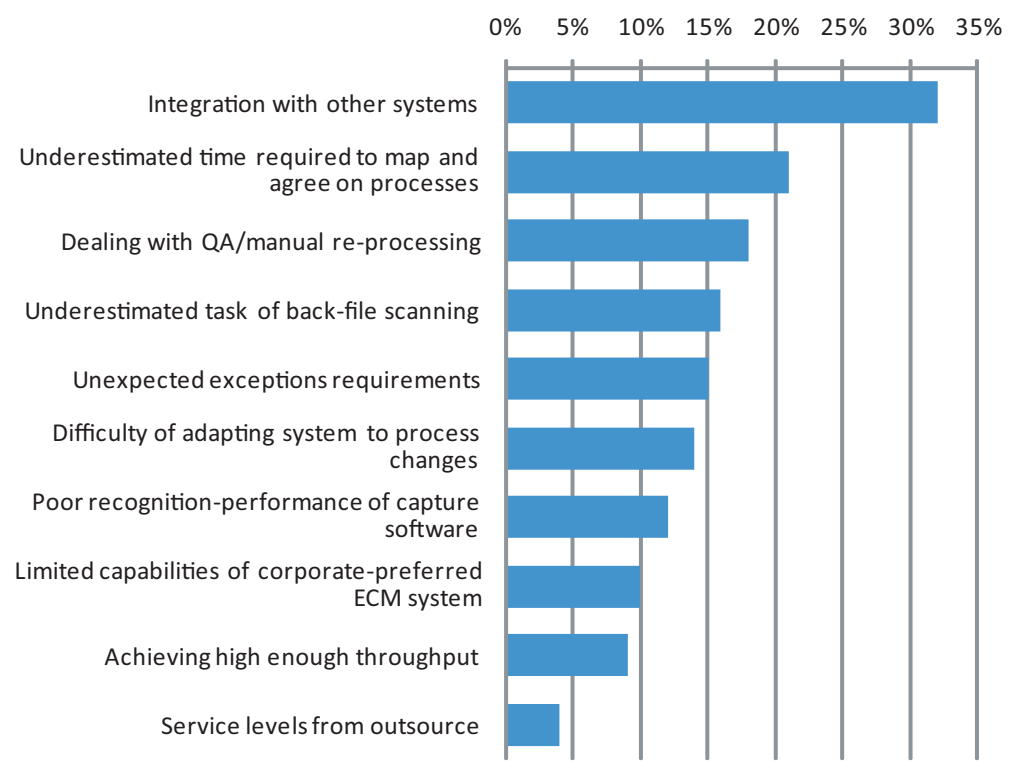
Figure 17: What are/were the three biggest technical issues you experienced during the implementation of Capture and BPM? (N=343)



## Return on Investment

In Figure 18, we compare the investment returns produced by the different elements of scanning and capture, normalized by the level of adoption. We can see that forms capture in its own right is less likely to produce the highest return compared to workflow. Automated document indexing can add strong additional returns beyond those achieved from scanning in the first instance.

Figure 18: In your organization, which of the following ECM functions have you invested in and enabled? Which three of the following aspects of ECM have produced the highest return on investment? (N=343, ROI normalized to scanning)
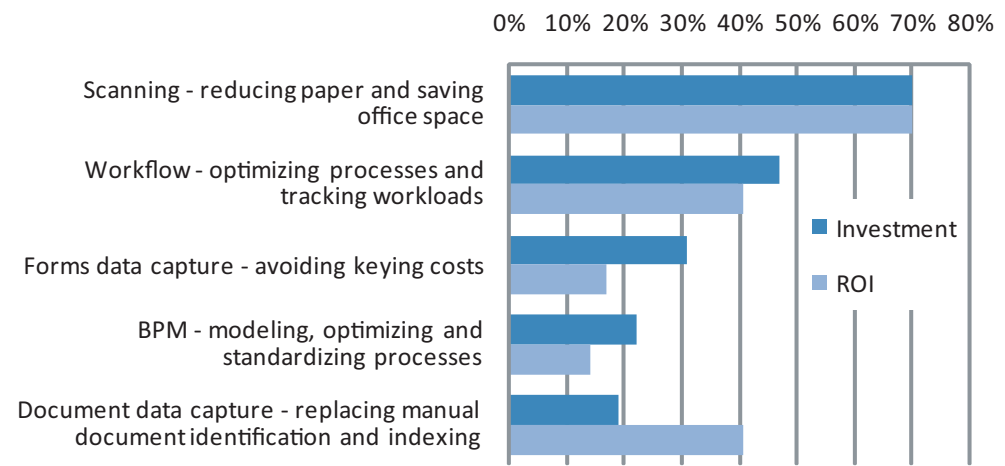


## Payback Period

As with previous AIIM surveys, the overall payback period of scanning and capture is much faster than with most other ECM or indeed, other IT investments. Here we have measured scanning and capture separately from BPM, but the differences are not large. Both provide positive returns within 12 months or less for 39% of respondents,

growing to just short of 60% of projects showing positive results within 18 months. This is a very rapid rate of return by most standards, and for many organizations, would fall within one budgeting period.

*Figure 19: What payback period would you say you have achieved or are likely to achieve from your investments in scanning, capture and BPM? (N=343)*
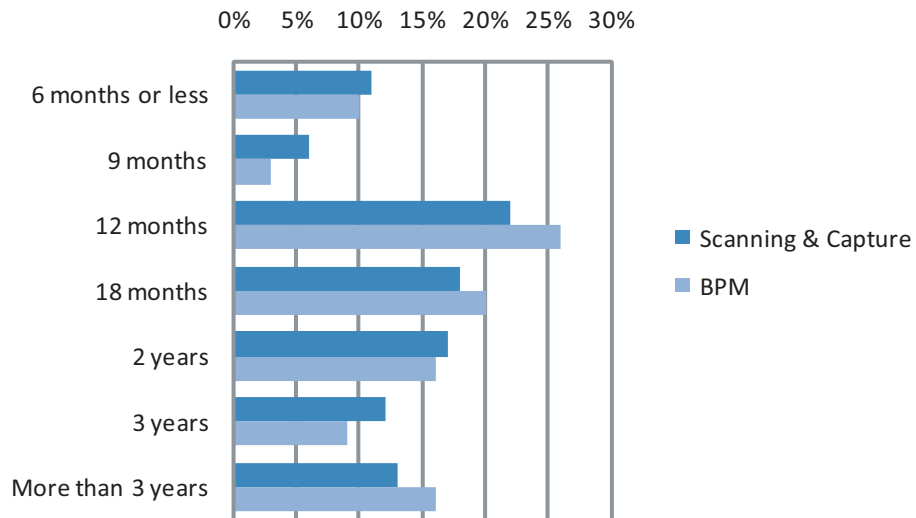


It can be useful to separate business drivers from cost-saving factors, although in these tighter financial times there is inevitably a degree of convergence. We would expect this to show a higher priority for the easier-to-measure hard dollar benefits compared to the more abstract soft-dollar improvements. Indeed, improvements to process efficiency do edge to the top, but only slightly above "better knowledge sharing and access", reinforcing the win-win scenario described earlier.

*Figure 20: Which two aspects provided the best financial return on your capture and/or BPM investment? (N=343)*
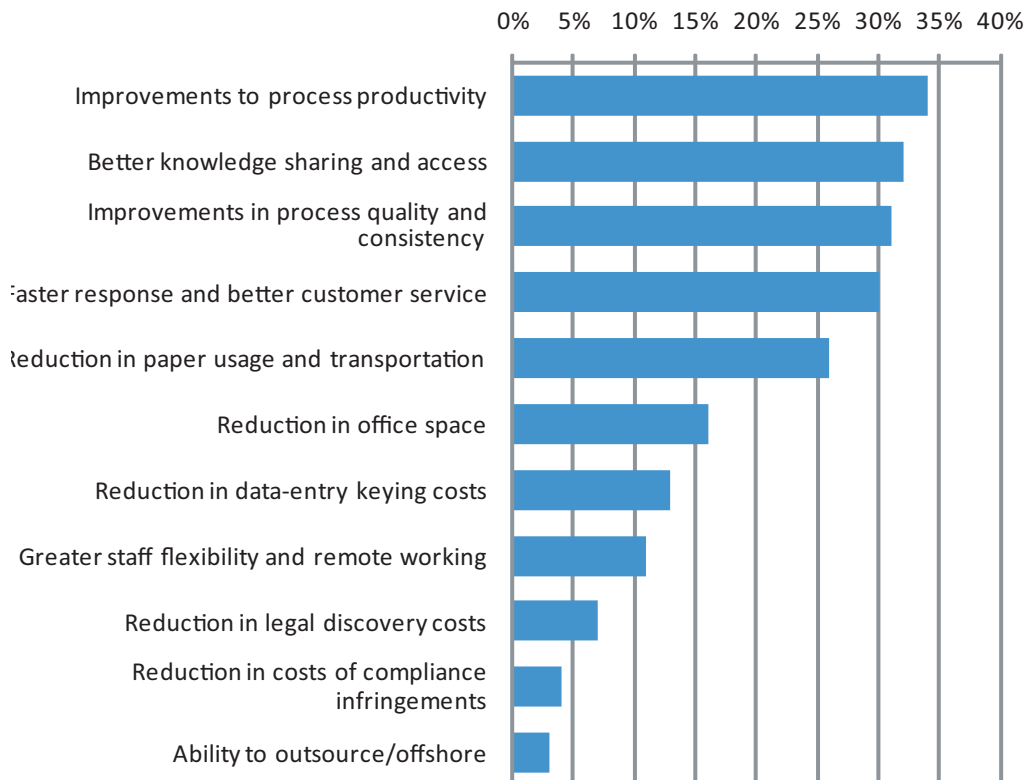
## Spending Plans

Spending on scanners seems set to stabilize to a net neutral position, compared to the fall back measured in the 2009 capture report. MFPs show a small net reduction, much as last year. Software modules for capture are set for continued growth in spend, along with BPM, which is tracking just slightly behind. SharePoint add-ons for capture and BPM seem almost to have peaked in this survey, which is in contrast to our dedicated SharePoint survey earlier in 2010. This difference could be attributed to a sampling effect of a slightly different demographic, or may reflect changes in the SharePoint 2010 function set. As regards services, outsourcing s losing ground financially, but consultancy services have bounced back strongly since 2009, as has training.

*Figure 21: What are your spending plans for the following product areas in the next 12 months compared to the last 12 months? (N=323. Line length indicates, "We don't spend anything on this")*

Capture and Business Process: drivers and experiences of content-driven processes
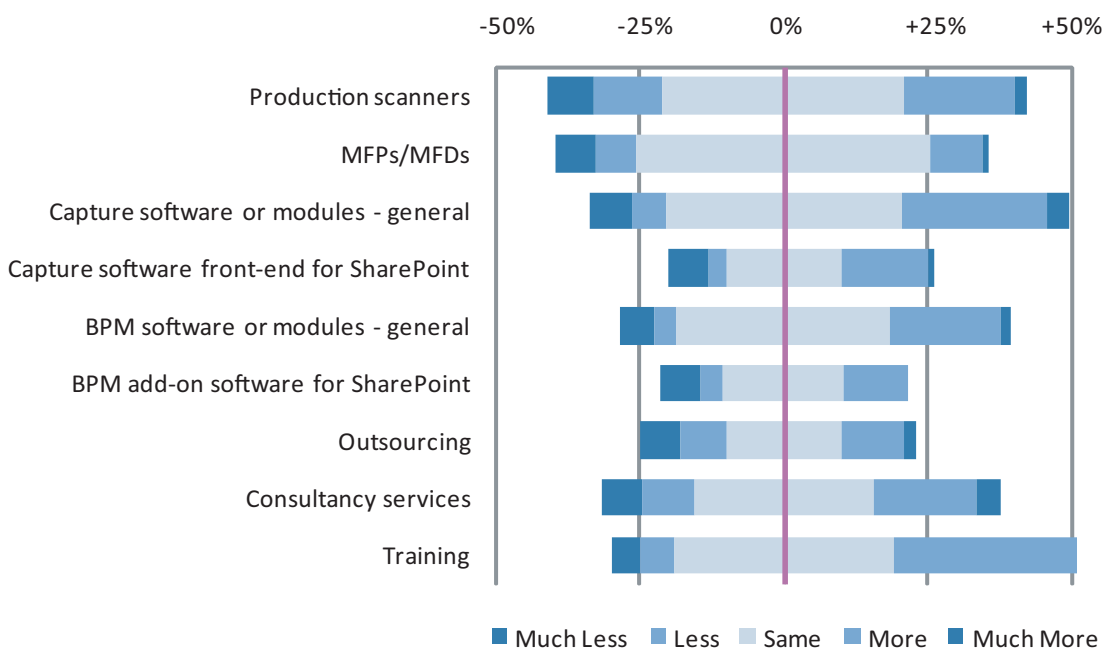
# Conclusion and Recommendations

Saving on office costs is still one of the primary justifications of a scan-to-archive project, but amongst our respondents, the longer-term benefit of improved information access and easier knowledge sharing is the strongest single driver.

A third of organizations automatically capture data within documents for routing or auto-indexing, although less than 25% are currently utilizing captured data as part of the business process itself. Optimizing processes and tracking workflow provide wider financial benefits than the avoidance of data keying.

Centralized and distributed strategies are given equal preference for strong expansion, with outsourcing showing small growth. There is considerable scope for a higher level of data capture as part of an outsourcing strategy, and only a small number of organizations outsource any aspect of the business process as yet.

Approximately half of surveyed organizations have capture-enabled their main enterprise systems for storage and retrieval of scanned documents, but only a quarter have integrated document data capture with the process itself.

Scanning, capture and BPM projects produce a payback of 18 months or less for nearly 60% of organizations.

## Recommendations

- The business case for scanning and capture projects should include the benefits of information and knowledge sharing as well as reductions in office space and paper handling logistics.

- Scan-to-process as a manual workflow can achieve considerably more benefits than simply scanning-to-archive, and the extension to capture-to-process by the addition of automated data recognition will provide considerable productivity benefits. This can be considered for both in-house and outsourced operations.

- For those organizations scanning-to-archive, manual addition of metadata can usefully be replaced by auto-indexing, with suitable recognition across different content types.

- It can make sense to implement a point solution for capture and BPM to solve an urgent line of business process issue, but this decision should be taken with a forward view of how it might be built out or integrated into a broader ECM system or suite in the future.

- Consider incorporating other types of electronic document such as emails, faxes and PDFs into the capture system in order to standardize the workflow process.

- Capture servers can now provide production-level recognition services for both centralized and distributed scanners, or a mix of both, allowing local business units and remote offices to feed their own business processes.

- Consider a scan-on-entry strategy by utilizing mailroom capture and electronic routing, either as an in-house resource or via outsourcing.

- Look across your enterprise systems for process data integration with captured documents, versus a single focus on storage and retrieval functionality.

- Strive to include decision makers across IT, Records Management and Line of Business to ensure that a comprehensive strategy is adopted, particularly with regard to SharePoint.

- Remember that BPM projects are likely to meet resistance to change, and ensure that potential users, and managers from other departments, are educated as regards the scope and potential benefits of BPM.

- Before embarking on a BPM implementation, audit current processes to ensure there is agreement between users as to what the processes are now, what exceptions to the process can occur, and how exceptions are addressed.

- When selecting a capture and BPM product or supplier, whether in-house or outsourced, consider the implications for integration with your enterprise systems, particularly for longer-term support.

# Appendix 1: Survey Demographics

## Survey Background

493 individual members of the AIIM community took the survey between October 14, 2010, and November 3, 2010, using a Web-based tool. Invitations to take the survey were sent via email to a selection of the 65,000 AIIM community members.

## Organizational Size

Survey respondents represent organizations of all sizes. Larger organizations over 5,000 employees represent 29%, with mid-sized organizations of 500 to 5,000 employees at 38%. Small-to-mid sized organizations with 10 to 500 employees constitute 33%. Organizations of less than 10 employees (36) are not included in the report.
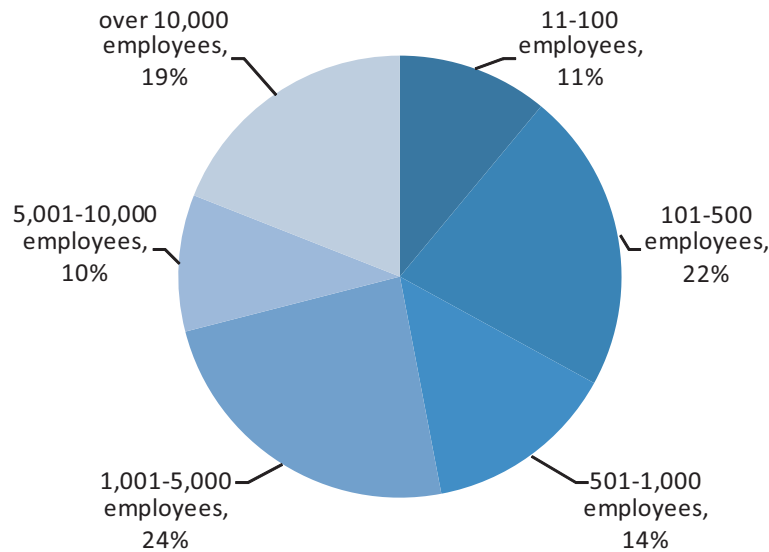


## Geography

71% of the participants are based in North America, with most of the remainder from Europe.
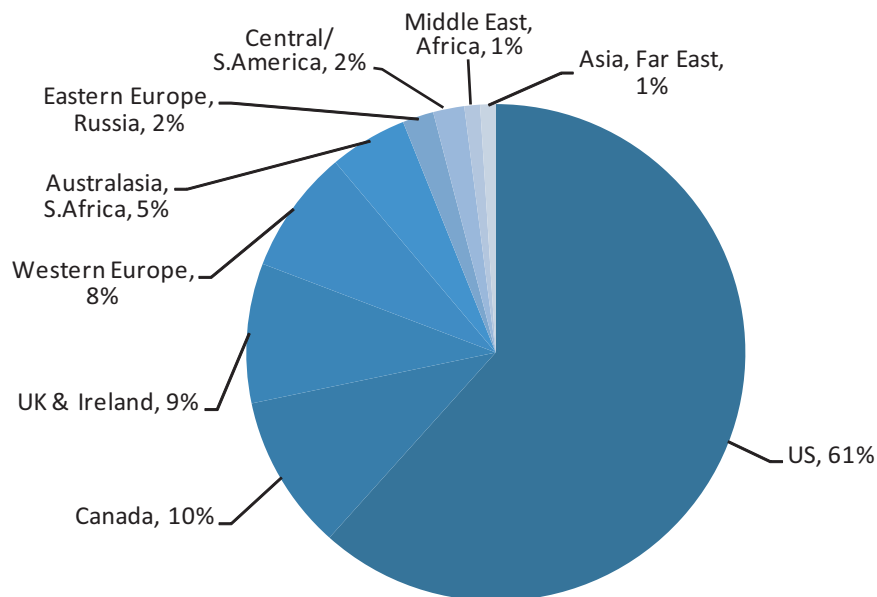
## Industry Sector

Local and National Government together make up 24%. Finance, Banking and Insurance represent 22%, which is higher than our normal demographic, indicating a high usage in that sector. Manufacturing also shows higher than usual at 8% of participants. To avoid bias, suppliers of ECM products and services have been removed from all of the report results.



Pharmaceutical and Chemicals, 2%

Web, 1%

Media, Publishing, Other, 5%

Charity, Not-for-Profit, 3%

Retail, Distribution, Transport, Real Estate, 3%

Legal, Professional Services, 3%

Consultants, 3%

IT & High Tech—not ECM, 4%

Power, Utilities, Telecoms, 4%

Oil & Gas, Mining, 4%

Engineering & Construction (AEC), 4%

Healthcare, 5%

Education, 7%

Manufacturing, Aerospace, 8%

Insurance, 7%

Finance, Banking, 15%

Government & Public Services - National, 7%

Government & Public Services - Local/State, 17%

Capture and Business Process:
drivers and experiences of content-driven processes

# Appendix 2:

## Do you have any general comments to make regarding Capture and BPM?

- It is exciting to see the ROI realized quickly and the light bulbs coming on in other areas of the organization when they see what we've done.

- There is a lack of understanding at the executive level and in IT of what BPM is, what ECM is, or how much these efforts will cost because we are so far behind.

- Change Management aspects larger than originally thought - requires full organizational support to succeed, especially at the senior and mid-manager level.

- Our experience has been positive so far. I would like to see us do more and spread the process into other functional areas.

- We're having a best ROI of all with this technology, and keep researching and improving.

- It was overwhelming when we started implementing, but over time, we discovered how simple it was once processes and procedures were in place.

- Figure out what you want to do, how much that will really impact things, write all that down, agree to it, THEN do an RFP...

- Although we have bought an ECM suite with BPM, the amount of work we had to put into the system (adaptations) has been far more than we expected. The performance issues concerning extensive workflows take up a large amount of time.

- We are looking at off-shoring/centralizing processing overseas in our regional processing hub. The ECM system is the key enabler for this process.

- Often seems to be a struggle to expand to other departments throughout the enterprise.

- It has allowed our organization to become leaner and more competitive for years.

# IBM

With IBM Enterprise Content Management (ECM) solutions, organizations can improve efficiency and reduce costs by gaining control of unstructured content. Knowledge workers can then access, collaborate and influence business decisions in new, innovative ways to increase competitiveness and maximize productivity. There are four critical areas of IBM ECM technology and solutions that can help you achieve your business goals:

**Essential Content:** Managing unstructured content throughout your organization – such as scanned images, electronic documents, web pages, video, email, electronic records, paper files – is an essential ECM capability to drive down costs while improving efficiency. Businesses need to use content, regardless of type or location, in a consistent, reusable manner (standardized and federated) to respond rapidly and accurately to information demands.

**Advanced Case Management:** IBM unifies information, processes and people to provide a 360-degree view of a case. Advanced case management relies on information, processes, advanced analytics, business rules, collaboration and social computing to help drive more successful, optimized case outcomes.

**Content Analytics:** Users need to find content when it matters most and turn passive content into active sources of insight. Trusted content analytics and search provide critical tools and capabilities to increase return on investment and business advantage.

**Information Lifecycle Governance:** A key goal of the integrated enterprise is to support compliance and risk management policies and regulations, improving eDiscovery and the collection, archiving, classification and management of all content from various sources while keeping unnecessary costs down throughout the lifecycle.

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**About AIIM**

AIIM (www.aiim.org) is the community that provides education, research, and best practices to help organizations find, control, and optimize their information. The AIIM community has grown to over 65,000 professionals from all industries and government, in over 150 unique countries, and within all levels of management including senior executives, line-of-business, and IT.

For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire enterprise content management (ECM) industry - including users, suppliers, and the channel - acts as the industry's intermediary.

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