# How Role-based Integration Strategies Increase Content Management Utilization

A White Paper Prepared for Factiva®, a Dow Jones and Reuters Company

October 2005

**factiva.**
Dow Jones & Reuters

# Bringing Information Workers On Board

Chief information officers (CIOs) are increasingly held accountable for the success of content management implementations. For organizations that rely heavily on information, such as those in the financial services, high technology and pharmaceutical markets, achieving success with content management initiatives is paramount. When information workers underutilize such enormous IT investments, significant challenges arise including minimal improvements in worker productivity. An underlying symptom of poor user adoption is the lack of easy access to role-specific data.

Fortunately, role-based content integration strategies are emerging that help CIOs leverage existing content management investments to deliver highly relevant data to information workers based on their unique roles in the company. This white paper will examine key market drivers, challenges faced by CIOs and how role-based content integration strategies can regain measurable returns on existing content management investments.

## Key Drivers for Change

Failed IT projects, the need to improve information worker productivity and the growing mobile workforce are key drivers impacting integration strategies.

Improving worker productivity has become a major concern for IT. Information workers spend an enormous amount of time seeking content that is often never found. For example, only 16 percent of available Web information can be discovered via search engines.[1]

An extensive study by IDC revealed that information workers spend more than 27 hours a week searching, gathering and analyzing information (see figure 1), costing a company with 1,000 information workers more than $40 million every year.[2] The study also discovered that information workers waste 3.5 hours a week searching for information that is never found and 3 hours a week recreating content, costing nearly $10 million a year for an organization with 1,000 information workers. As IDC explains, "It has become obvious that tasks related to creating, organizing, finding and analyzing information have become significant time sinks. The problem will only get worse." The report claims that automating repetitive steps and eliminating those that waste time will increase information worker productivity and save organizations millions of dollars.
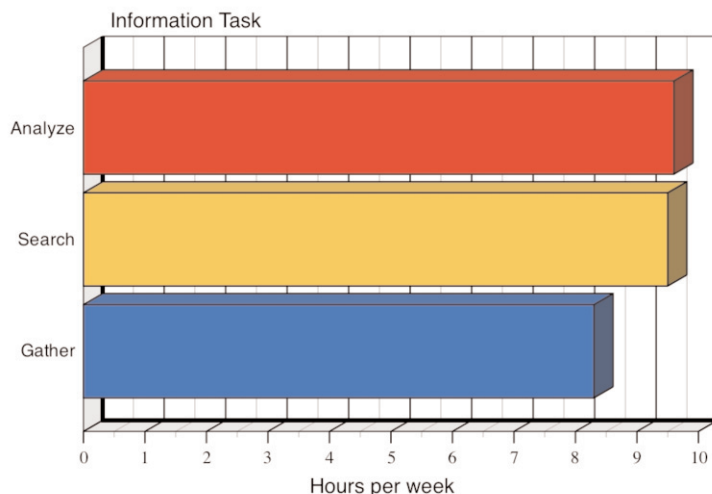


**Figure 1:** Hours per week spent performing information tasks.[3]

When information workers must engage in a business process, they often do not know where to begin and have limited access to information. As IDC explains, "Rapid access to information drives effective business processes, but today's computing environment is still largely composed of standalone, 'unaware' collaborative applications and services."[4]

Add to this the need to extend information to the growing base of mobile workers. iGillottResearch estimates the U.S. mobile workforce stood at 56.6 million in 2004 and that the figure will rise to more than 61 million by 2009.[5] Integrated corporate information must now be disseminated via laptops, mobile phones, personal digital assistants (PDAs) and BlackBerries. Gartner predicts that by 2008, more than 80 percent of mobile information workers will have access to wireless e-mail.[6]

Relevant, role-based information delivered to workers wherever they are will help reduce information overload, streamline worker efficiency and automate tedious tasks, ultimately leading to higher user adoption.

## Content Management Challenges Faced by CIOs

CIOs are increasingly expected to drive increased user adoption, address the role-specific requirements of information workers, justify the cost of content management initiatives and accommodate remote workers.

[1]Whaley, C. (May 13, 2005). *Coumputing Canada*. Finding the needle in a haystack of information.
[2]Feldmen, S., et al. (March 2005). The hidden costs of information work.
[3]Ibid
[4]McDonald, B., et al. (February 2005). Industry development and models: The enterprise workplace: How it will change the way we work
[5]*Austin Business Journal.* (April 1, 2005). Report: Number of mobile workers on the rise.
[6]Dulaney, K., et al. (October 29, 2004). Predicts 2005: Mobile and wireless technologies.

## Poor User Adoption

Often, content integration solutions result in low user adoption because a number of user-related considerations were overlooked in the planning process. A common IT assumption is that applications will be easy and intuitive to use. In reality, new applications often require ongoing training, workflow changes and cultural shifts. When employees need to change the way they work to use a system, a high barrier to adoption emerges. If users feel they are being forced to use a system and its benefits have not been made clear, user adoption will be low. The lack of fresh and relevant information is another reason users abandon new solutions. When information is out of date, information workers will seek alternative ways to get what they need.

## Lack of Role-Based Information Presentation

Content management systems often present information aggregated into corporate categories, but not delineated based on a user's job role. The typical result is information overload because workers must sift through content to find data relevant to their unique job responsibilities. Alternatively, information workers often need to search across many applications to find what they need because content management systems are too broad for their specific requirements.

Users need the right information at the right time to make effective decisions. Often, documents are written and read once, leaving valuable content undiscovered for others within the organization, resulting in the duplication of efforts. For example, consider a salesperson who is creating a presentation and needs access to relevant statistics that coincidently another salesperson used in a similar presentation. Not knowing about that existing knowledge results in duplicated effort and the salesperson taking a longer time to do his or her job. When critical information is not quickly available, decisions are not well informed and efforts are often duplicated.
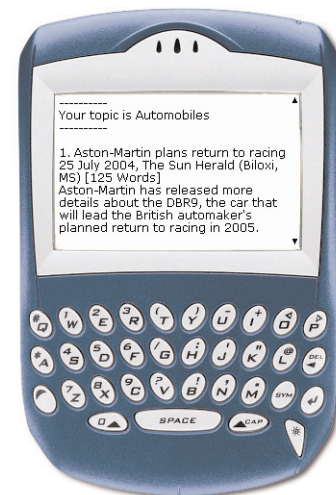
## Cost Justification

Corporations spend many months and millions of dollars implementing content management solutions to help increase information worker productivity. Unfortunately, many organizations find out too late that solutions are not meeting the ever-changing needs of information workers. The result is often a very slow return on investment—or worse, the total scrapping of projects. For IT, the reality is that projects do fail, in part due to misalignment of business and IT expectations, and this places greater pressure on CIOs to ensure a project will succeed prior to implementation.

The implications of failed projects include information workers reverting to old, inefficient processes. A critical step in any content-based implementation is fully understanding the needs of key groups of information workers.

## Remote Workers Overlooked

Not all content management applications are able to accommodate remote, on-the-go workers who rely on mobile phones, BlackBerries and PDAs. When mobile information workers lack access to relevant information, they are unable to leverage the knowledge available to their fellow information workers. As a result, they are not able to perform to the same standards as desk-based employees because content management systems have not been extended to their on-the-move work environment.

To best meet the information needs of all information workers, knowledge must be integrated, sorted and represented based on each employee's unique role in the organization, regardless of his or her physical location. It is challenging to take information that exists in multiple languages, sources and formats and unify it into a solution that can be delivered across multiple media. In addition, line-of-business information investments are valuable sources of knowledge that are also difficult to link with other data silos. Integration is further complicated when external sources of information, such as relevant news, are integrated to create a total knowledge picture. However, a proper role-based content integration strategy can overcome these many challenges.

# The Solution: A Role-based Content Integration Strategy

Applying a role-based content integration strategy to existing content management investments will help overcome the many challenges faced by CIOs, including increasing user adoption and ensuring remote users are able to tap into content knowledge. A role-based content integration strategy results in the presentation of highly relevant content based on each information worker's particular job function.

The strategy involves the integration of internal and external content that is presented via a common user interface within an

existing CRM or portal. Internal documents may include material such as Microsoft Word documents, internal company reports or other information that exists within content management systems and file sharing applications. External information could include analyst reports, industry news and competitor information. Tapping into existing systems and combining external content empowers information workers with easy, centralized access to what they need, increasing user adoption and accelerating the return on investment for existing content management initiatives.

A successful role-based content integration strategy includes three primary processes: an assessment, content integration and steps to ensure user adoption.

## Assessment

The assessment portion of the strategy involves a careful examination of employee workflow to understand what information is needed to best perform tasks. Different information worker groups are examined to determine the unique needs of employees based on roles. Internal and external information is examined and necessary changes to existing applications are identified. Both mobile and desk-based information worker needs are identified. The end result of a proper assessment will reveal the critical information required for specific workflow processes and result in productivity increases.

## Integration

The integration portion of a role-based content integration strategy involves the presentation of role-relevant content to information workers via multiple media formats, including mobile device presentation. Blueprints to internal and external information are created based on roles. The design portion of a role-based integration strategy includes functional requirements, defining interfaces between applications, prioritizing applications for integration, specifying automated functionality and deciding where to deliver content.



Role-relevant content is then integrated into existing CRMs or portals. For example, an information worker in sales might see data related to his or her top accounts, timely news about client industries and a strategic account plan in a single integrated console. A marketing professional might see advertising campaign results, lead-related contacts and competitors in a similar interface.

## Adoption

A fundamental and often overlooked key to any content management strategy is a tangible and results-oriented adoption plan. An adoption plan should involve key executives in the process of communicating the benefits of a role-based content integration strategy. Tactical steps may encompass weekly marketing promotional campaigns, successful user stories and tailored presentations to highlight the benefits for users.

# Benefits of a Role-based Content Integration Strategy

A role-based content integration strategy provides the following benefits:

- **Maximizes existing content management investments** by enhancing the application's functionality and presenting role-based content that workers can immediately utilize.

- **Stretches the boundaries of content management applications** by delivering relevant data to information workers based on their job functions.

- **Ensures remote workers gain access** to relevant, updated information via mobile devices such as BlackBerries, PDAs, mobile phones and laptops.

- **Increases information worker productivity** by providing a single source of access tailored to job functions, eliminating the need to comb through multiple systems.

- **Enhances business decisions** with competitive and industry-relevant news and information presented alongside other role-based information and by providing information that was previously not part of the decision-making process.

- **Provides single system access** to everything needed to make decisions.

- **Helps IT** better meet the needs of business units.

- **Eliminates duplication of effort** by consolidating knowledge assets into a universal interface.

# What to Look for in a Role-based Content Integration Strategy Consultancy

A properly executed role-based content integration strategy is critical to ensure higher returns on content management investments. When seeking an organization to aid in your strategy, consider the following requirements:

- **Specializes in information workflow integration:** The ideal company should focus on data you have within existing role-based workflows, adding external information to provide business value.

- **First-hand experience:** The vendor of choice should have experience integrating and processing thousands of documents daily and ideally has applied the concept to its own organization. Ask for reference accounts and testimonials.

- **Understands content:** Seek an organization that has extensive understanding of internal and external content, and can consolidate both to meet organizational needs.

- **Accommodates remote users needs:** Look for solution that offers flexible delivery mechanisms for remote users, providing access to information across multiple platforms including BlackBerries and PDAs.

- **Performs a comprehensive assessment:** A detailed, role-based content assessment should be conducted based on a series of interviews, focus groups and workflow assessments to understand what applications are used in the workflow process and how they can be maximized.

- **Aids with user adoption:** Look for a company that has a proven methodology and experience to ensure user adoption.

- **Extensive technical expertise:** Seek a vendor that fully understands the challenges of information integration and has experience integrating knowledge assets into a wide range of applications, directories, content management systems, portals and CRMs.

- **Leverages a service-oriented architecture:** Be sure the solution leverages a modular Web services platform for scalability, flexibility and rapid development.

- **Industry expertise:** Seek a solution provider that has worked with other Fortune 1000 customers in your industry and provides a robust method of organizing information.

- **Subject matter experts:** Look for a company that relies on senior-level taxonomy and editorial experts, and is not solely depending on technology.

- **Solution-agnostic:** Seek a company that recommends information that is appropriate for roles and leverages whatever tools currently in use to deliver content, rather than suggesting a completely new application.

- **Cross-language support:** For multinational organizations, seek a vendor that can integrate global information repositories and has experience working in multilingual environments.

# The Factiva Solution

Factiva, a Dow Jones & Reuters company and the world's leading provider of global content, offers the most comprehensive content integration strategy services the industry has to offer. Factiva specializes in all aspects of role-based content integration outlined in this paper, from the needs assessment to the assurance of user adoption, and provides the people, processes and technology that Fortune 1000 corporations have come to rely on. Factiva helps enterprises enrich existing content management solutions with internal and external content to create a powerful base of knowledge for the corporate workforce, wherever they are.

Factiva Consulting Services, a division of Factiva, is a comprehensive team of content integration professionals who specialize in all aspects of role-based content integration, from the initial assessment to design, deployment and adoption. Factiva Consulting Services offers information strategy, integration, taxonomy and project management services.

Fortune 1000 clients select Factiva because it enables businesses to distribute targeted business news, track competitor business news and integrate content into workflow applications.[7] The majority of Factiva customers receive positive results within 6 months. Results include improving efficiencies, faster access to the right information and the beginning of a return on investment.

To find out more about Factiva's role-based content integration strategy, visit www.factiva.com.

---

[7]From an ROI study conducted by Gartner on Factiva *Fortune 1000* clients.