Gimmal

Digital Workplace Checklist

3 key initiatives for the success of your digital transformation

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"Digital Workplace"
is a hot buzzword right
now, and leading analysts are working
to define what the term means. Practitioners and real-
world implementations, however, will ultimately define best practices,
the success and limitations of digital workplaces that manage unstructured content,
information, and data. With 80% or more of the average organization's information managed as
unstructured content,[1] this area has been a critically important but somewhat unmanaged part of the
equation for a successful digital workplace.

In the past, content management or enterprise content management (ECM) was thought to be the path
forward for managing all unstructured content in most organizations. Information and content could
be categorized, tagged, and stored so it could be accessed for collaboration and so business processes
could be automated. But as innovation becomes more time-sensitive and collaboration becomes more
vital to business performance, it is time we reevaluate how we digitally engage our employees, vendors,
and customers. **We need to ask ourselves how we manage the information and content so that we
are sure to empower the right people with the information they need right when they need it.**

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1 John Webster, "Big Data Deserves IT's Attention," ComputerWorld, http://www.computerworld.com/article/2550148/business-intelligence/big-data-deserves-it-s-attention.html

Digital Workplaces: bringing work *to* people

The term "digital workplace" has evolved to describe the sort of collection of IT assets that serves the purpose of enhancing 21st-century business processes. Much has been written on what a digital workplace is, what it should be, and how to create one (Googling the term yields over 450,000 results, including the inevitable websites for companies whose monikers include the term).

In one article on CMSWire, "What a Digital Workplace Is and What It Isn't," UK intranet consultant Sam Marshall proffers a definition of sorts that we particularly like:

> The digital workplace is meant to be a virtual equivalent to the physical workplace, which requires strong planning and management due to its fundamental role in people's productivity, engagement and working health.

The core philosophy driving the digital workplace, Marshall goes on to suggest, is "putting people first." This has implications for how we approach the technologies that enable the digital workplace: it calls for "thinking about how they come together from an employee's point of view."

On the topic of technology, Marshall says: "The visible parts of the digital workplace are technologies and ways of working that allow people to connect, collaborate, communicate, and cooperate without necessarily being face to face."[2]

Strategy& management consultants Ramez Shehadi and Danny Karam get a bit more prescriptive, proposing that there are "Five Essential Elements of the Digital Workplace" organizations must consider in order to "capitalize on the new ways that employees work" in a business world that "is moving faster and becoming more global, more mobile, and more digitized."

Access devices	Communication infrastructure	Business applications	Workplace tele-communication tools	Digital security

How does this relate to enterprise content management?

Now what does the idea of a digital workplace, designed with the principle of putting people first, and considering key technologies, mean for information management?

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2 Sam Marshall, "What a Digital Workplace Is and What It Isn't," CMSWire, http://www.cmswire.com/cms/social-business/what-a-digital-workplace-is-and-what-it-isnt-027421.php

First, information is only useful to employees (and by extension, to the organization) if users can easily access it when they need it, understand it, and trust its validity. This calls for a unified approach to information management, employing a consistent hierarchy, and breaking down silos by enable people to share information across the organization, regardless where the information originates.

For information to be meaningful, timely, and reliable demands solid governance: ensuring that all content comes with context and that the associated retention/disposition schedules are in place. For information to be truly accessible, it must be available where people work – whether in an office or in the field – using their preferred devices. As the Strategy& consultants note, "smartphones and tablets are increasingly becoming a necessity, so companies need to rethink their device strategies based on business needs."[3]

Compliance and usability must go hand-in-hand

As noted earlier, information governance directly impacts the usefulness, and therefore value, of information. It also facilitates regulatory compliance and enhances security – it's like locking the doors at night (and it should be that easy).

Good governance depends upon establishing reasonable policies, and on users maintaining compliance with those policies. Compliance rests in the hands of those creating and storing content. The likelihood of compliance increases significantly when users/content generators don't have to think about it. We need to apply ergonomic principles to content generation and application of governance rules and make it easier for users to "do the right thing."

Business applications are the primary source for much of the vital information of any organization. Shehadi and Karam caution that, "Many organizations invest in productivity technology but do not sufficiently integrate it with their business applications."[3] Marshall also points out that "traditional business systems like SAP, PeopleSoft, databases, and CRM ... perhaps get overlooked because they are an accepted part

Underestimating the challenge

Consider the following statistics:

36%

of a typical knowledge worker's day is spent looking for and consolidating information spread across a variety of systems

80%

or more of the average organization's information is unstructured content

Across 33 rich countries, only

5%

of the population has high computer-related abilities, and only a third of people can complete medium-complexity tasks

An information governance plan that does not consider the range of business content that must be managed, the time it takes to manage the content, and end user skill is bound to fail.

We must plan to provide simple, integrated experiences for our users, and insulate these systems against the future by building them on pervasive, easy-to use platforms.

of the fabric of most businesses, however, they are part of what should be considered with a digital workplace strategy, at least from an alignment point of view."[3] Employees continue to rely on these systems: how well they are integrated with technologies more commonly associated with the digital workplace will have an impact on the effectiveness of information management.

The Digital Workplace Checklist

A desire to foster greater collaboration drives a lot of digital workplace initiatives. All the things we've highlighted so far regarding information management play to that objective: increasing the usefulness of information, breaking down silos, making information more accessible, ensuring good governance, and integrating critical legacy systems. And much of what we've discussed is rooted in familiar principles of ECM. **The important difference from traditional ECM is the focus on putting people at the center when implementing those principles.**

A digital workplace does allow for greater collaboration. At its best though, it goes well beyond: it creates a virtual counterpart to the brick and mortar office that reinforces corporate identity, and by protecting and maximizing the value of an organization's information assets, improves performance and reduces risk. Here are three initiatives that should drive your digital workplace strategy, and steps you can take to achieve them.

1   Maximize information value

The value we can extract from information stems from how well we are able to leverage that information. One of the key benefits of the digital workplace model is found in increasing the ROI of business information.

Understand the value of information quality and knowledge sharing

In its Info Entrepreneurs blog, the Canada Business Network talks about the "knowledge advantage" – harnessing the many forms of knowledge that exist in a business "in a coherent and productive way." Forms of important knowledge include:

- The experience of your employees
- The designs and processes for your goods and services
- Your files of documents (whether held digitally, on paper, or both)
- Your plans for future activities, such as ideas for new products or services

They recommend that organizations "take a strategic approach to discovering, collating, and sharing" information via a knowledge strategy.[4] As we noted in our earlier discussion of digital workplaces, the usefulness of information depends on its relevance, timeliness, and reliability – i.e., its quality – as well as its accessibility.

For a digital workplace strategy to be successful, it needs to be supported by an overarching plan for managing the information, unstructured content, and data that form an organization's body of knowledge.

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3 Sam Marshall, "What a Digital Workplace Is and What It Isn't," CMSWire, http://www.cmswire.com/cms/social-business/what-a-digital-workplace-is-and-what-it-isnt-027421.php
4 "IMPORTANCE OF KNOWLEDGE TO A GROWING BUSINESS," Info Entrepreneurs, http://www.infoentrepreneurs.org/en/guides/importance-of-knowledge-to-a-growing-business/

Maximize information quality

Just as people should be the focus of the digital workplace, people are likewise central to ensuring the quality of information. In his "10 principles of effective information management," James Robertson, Managing Director of Step Two, emphasizes the importance of people in effective and successful information management. The people who generate or otherwise shape information need to understand the processes for managing information. Robertson notes the importance of clearly communicating the purpose of their participation and "identifying the 'what's in it for me' factors" for employees, along with making sure that the systems involved are "useful and usable for staff."[5]

We also need to be realistic about the amount effort these initiatives require of our end users. We cannot attain a "critical mass of usage" if users are forced to spend an inordinate amount of time conforming to process. The more that can be automated, the less we must ask of our users. The less we ask of our users in terms of compliance, the more value their work can provide the organization.

Plan for information governance

A plan for information governance may sound complex and onerous to develop and implement, but it is vital to protecting the value of an organization's information. The Information Governance Initiative defines information governance as "the activities and technologies that organizations employ to maximize the value of their information while minimizing associated risks and costs."[6]

The delineation of an information hierarchy, information lifecycle, and retention and disposition policies should be rooted in the priorities of the business and tied to its knowledge strategy, as well as support compliance with any applicable regulations. You must establish rules and processes to implement governance policies.

Rules-driven process automation, enabled through technology, can make it easier to implement these vital controls and allow the consistent application of governance rules across all sources of business information, including transactional systems.

Ensure user adoption: Speed, accuracy, and ease of access are key

Leveraging business information for maximum return depends in large part on effective information management, including consistent governance and an "all hands on deck" approach to ensuring quality. Your data-driven process improvements will have the best chance for success when you keep the time between data collection and dissemination to a minimum. Business decision-making is enhanced when the organization's systems of record are in sync, and you save valuable time by avoiding the need to ascertain which version of the truth should be respected.

At this stage, it would also be pertinent to involve stakeholders from every department, because they will help to inform their teams and thereby increase adoption. Additionally, they will be able to spot any potential issues the new policies could produce. **Since every department may have different processes when it comes to information, this involvement is critical.** Finally, having the message come from people within their own department will make it more relatable.

By managing information in a consistent manner, and breaking down barriers across information silos (ERP, HR, Corporate Communications, etc.), we can create digital workplaces that improve collaboration with higher levels of knowledge sharing and operational intelligence.

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5 James Robertson, "10 principles of effective information management," Step Two, http://www.steptwo.com.au/papers/kmc_effectiveim/
6 Information Governance Initiative, http://iginitiative.com/

Digital Workplace Checklist

Case Study
Reducing Risk with SharePoint

This Fuel and Convenience Retailer is the second-largest publicly traded fuel and convenience retailer in North America, with over 12,000 employees with 1,900 retail outlets in the U.S. and Canada

After the divestiture of their parent company, this new company needed to build a new IT infrastructure after divestiture from parent company. They also wanted to reduce the high cost of departments automated on different legacy ECM platforms.

Needing to immediately support the HR needs of hundreds of stores, this company also needed a quick path to ensure regulatory compliance.

With Gimmal and SharePoint, they:

- Replaced outdated FileNet system with lower cost, higher-functionality SharePoint-based platform
- Removed high-maintenance OpenText SAP integration in favor of high-performance Gimmal Accounts Payable solution
- Reduced risk as employee, capital, vendor and receipt records are managed in SharePoint in accordance with regulatory stipulations

READ THE FULL CASE STUDY

2 Rationalize information storage and access

To truly be useful, information also must be **easy to find**. According to research from the International Data Corporation, 36 percent of a typical knowledge worker's day is spent looking for and consolidating information spread across a variety of systems.[7]

One way to ensure that your organization's information is easy for your employees to find is by adopting a "**one-stop shop**" approach to information delivery. This doesn't mean that all your information is in one place. Rather, that you unify your information management approach and deliver that information effectively.

A one-stop shop approach gathers enterprise content managed against an easy to understand lifecycle within a searchable system, and then presents that information in ways that are geared to the needs of each end user. This approach maximizes the availability of relevant, up-to-date information when and where it's needed.

Many large enterprises are finding increasing value in having a consistent platform and information management approach for content on their intranet, collaboration sites, knowledge sharing, enterprise content, and records management systems. SharePoint and Office 365 offer a compelling platform to achieve this, given the right information architecture and governance and records management solutions to extend native capabilities.

A single source of truth

On a grand scale, you can think of one-stop shops as establishing a source of truth for your organization. In this scenario, employees have a single place to go where they can readily access content that is most pertinent to their individual jobs in the organization, and when they need information related to another role, they can easily search for and find it – if they are permitted to do so. In every instance, they're assured that they have most current version of the information available.

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7 "The Knowledge Quotient: Unlocking the Hidden Value of Information Using Search & Content Analytics," IDC, http://pages.coveo.com/IDC-Research-Report-The-Knowledge-Quotient.html?utm_source=PR&utm_medium=release

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It is time to begin moving teams away from a heavy reliance on the traditional file system model. As an organization and its volume of information grows, these systems begin to break down. Departments typically develop their own hierarchies of folders based on what makes sense to their users. Invariably, documents that are important to multiple departments get copied to each department's folder location. When a file needs updating, the task of ensuring that every copy of that file is updated becomes a nightmare, and likely won't get done.

Employees can no longer be confident that they have access to the most up-to-date version of content.

Information governance is essential to sustaining a one-stop shop

We've said this before, but it bears repeating: **information governance is essential** to consistent tagging and findability of content. Consistently implemented governance rules and retention

policies ensure that obsolete content is disposed of appropriately, eliminating the need for employees to figure out what version of a file they should use.

In addition, rather than relying on folders to categorize content as in shared drives, our one-stop shop makes use of metadata, which associates useful categories and attributes with the content through the use of tags such as file type, creation date, relevant user types, and associated projects. By tagging content in this way, we can derive role-based views of a collection of content (e.g., lists that display content that is of importance to a specific role), and circumvent the need to distribute of individual copies.

Metadata can also drive automated actions based on governance rules. For example, it can be used to trigger document disposition (archiving, deletion, etc.) in keeping with its associated retention policy. These rules can be triggered based on the document's lifecycle state, its content type, or by a specific

event. What's more, automation can help you make sure that metadata is correctly and consistently *added* to content **as it is generated**. Examples include offering users drag-and-drop capabilities for uploading content and automatically assigning metadata values based on rules that you have pre-defined for that type of file or upload area.

Your success hinges on the user experience

Finally, a one-stop shop for content and an effective and efficient means for governing that content are critical underlying elements, but achieving the benefits of a one-stop shop for information ultimately depends on how your users engage with it.

In their research report, "Intranet Portals are the Hub of the Enterprise Universe," user experience research and consulting firm Neilsen Norman Group notes, "As organizations inch toward a digital workplace, intranet portals are beginning to serve as the hub of the corporate wheel, providing spokes of information and applications that serve diverse and increasingly dispersed workforces."[8]

A portal can be an ideal way to present the information your employees are most likely to use and give them an easy means to find other information that they need less regularly. To best provide a "diverse and dispersed" set of employees with the information most relevant to them, this kind of portal is likely to have multiple levels – displaying content that applies enterprise-wide, and different content that is specific to a department, a corporate function, and/or other organizational groupings.

So what does the user see?

What an individual employee's one-stop shop will look like depends on their primary role. Their entry point could be the company Intranet or a portal at the departmental, functional, or project level. No matter their entry point, it should give them one-click access to enterprise-level information, as well as the ability to personalize their view to include other associations, e.g., their location or department.

In addition to linking users with the information they need most, a well-designed portal with a consistent user experience across all hierarchical levels and groups within your organization will promote corporate identity, reinforce corporate culture and values, and heighten awareness to company-wide issues.

Enablement

Realizing a one-stop shop for information requires thoughtful planning and design… and the right technology. The platform you select needs to be able to bring together your corporate information and give you the flexibility and capabilities to develop the governance and user experience required to successfully implement your one-stop shops.

3 Achieve symbiosis between user experience and governance

The main driver for any digital workplace initiative is the need to facilitate collaboration between employees wherever they're located. As with the other items on our checklist, putting the user at the center of consideration is the key to success. Your digital workplace can only reach its full potential (and provide a productive platform for collaboration) once your information lifecycle, along with the governance rules that support it, is codified and executed.

Exploit the relationship between information governance and the user experience

Information governance and user experience have a symbiotic relationship: how effectively information is governed determines the nature of the user experience, and the quality of the user experience can determine whether your information governance plan is actually in effect. By comprehending this interdependence, you

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8 "The Knowledge Quotient: Unlocking the Hidden Value of Information Using Search & Content Analytics," IDC, http://pages.coveo.com/IDC-Research-Report-The-Knowledge-Quotient.html?utm_source=PR&utm_medium=release

can create safeguards that ensure you successfully manage your information. **In effect, you want to make compliance with governance rules "the path of least resistance" for users**. Here are a few recommendations to achieve this.

Require as little effort from the end user as possible

Your system should be able to guide the average person through the process of loading content correctly – tagged with appropriate metadata, retention policies applied, and stored in the appropriate location.

Jakob Nielsen, Ph.D., principal and co-founder of the Nielsen Norman Group, provides valuable perspectives on what you can expect from that "average person" in The Distribution of Users' Computer Skills: Worse Than You Think. Citing a large multi-year, international study conducted by the Organisation for Economic Co-operation and Development, he notes that, "Across 33 rich countries, only 5% of the population has high computer-related abilities, and only a third of people can complete medium-complexity tasks."[9] Even if you believe that your employee population possesses better-than-average general computer skills, you should assume that most of them are ignorant of the details of ECM administration and compliance.

Don't rely on users to keep track of versions of content

Your system should also take care of version control and the managing document dispositioning. Your employees need to be confident that they aren't referencing an obsolete document, and when collaborating or making updates on a file, that they are working with the right version – without engaging in laborious browsing and comparisons. Your system should enable users to quickly view a file's revision history, including who has modified it and how.

Keep necessary tasks short and simple

Make sure that your system conforms to the average user's expectations for how they will interact with systems. Consider that your users are likely to spend time on social platforms and modern websites, where they can accomplish what they need to through simple processes that involve minimal steps. They can send a file by dragging and dropping it into an email. They can share an article by clicking a "share" icon and selecting a destination, or disseminate an idea by typing a comment, pasting a link, and clicking "post" in Facebook.

In contrast, a process to upload a file that involves navigating multiple checkboxes and dropdown menus and entering a dozen or so attributes, with information lifecycle terms that may be unfamiliar (i.e. a typical SharePoint default process), presents roadblocks to the user that may lead them to abandon the effort.

Something people want to use

In the recommendations above, we've talked primarily about improving the user experience related to implementing information governance. Technology can help you achieve this, with capabilities like "drop zones" that permit users to drag and drop documents with the appropriate context provided automatically, system-initiated version controls, and automated execution of retention policies. By simplifying and automating governance processes, you remove a burden from your users and by ensuring better governance, you go a long way toward increasing user satisfaction with their digital workplace.

Don't underestimate the importance of making your workplace attractive

You can also leverage technology to take you even further in providing an engaging user experience that effectively supports collaboration. Personalization features help put each user front and center and can simplify navigation. For example, a sidebar that follows the user across intranet sites and gives them quick access to the information and people that are most important to them.

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9 Kara Pernice and Patty Caya, "Intranet Portals are the Hub of the Enterprise Universe," Nielsen Norman Group, https://www.nngroup.com/articles/intranet-portals/

Consistency in branding and look and feel, with clear navigation tools that are consistent across your intranet, reduces confusion and eliminates the need for a user to relearn how to get around each time they move to a different department's site. Simple but robust search capabilities will allow users to filter results help them quickly find the information they need (and more closely match those user expectations we mentioned earlier).

Moving to the cloud is only a part of it

A cloud strategy is becoming increasingly important, but a mature digital workplace must make information accessible to people whenever and wherever they need it. The quality of the experience of getting to the information is therefore also critical. A satisfying and productive user experience depends on responsive sites and attention to compatibility between systems and devices.

With needed information potentially coming from a variety of sources, a positive user experience also requires consistency – in the navigation to and within content areas, in the mechanisms available to search for content, and in how search results are displayed.

Employees should not need to know or care where information originates: **how they go about finding information should be simple, devoid of surprises, and entail minimal training**.

Individual productivity can be enhanced by acknowledging the impact of **individual preferences and providing options for personalization** of what and how information is displayed. Putting people at the center of design considerations also plays a vital role in successful information lifecycle management.

Governance, compliance, security, and usability

Truly productive digital workplaces provide a consistent experience, a cogent information architecture, and govern that experience so that information is both secure and easy-to-find. Every gap in the information lifecycle and user experience is an invitation to lost or stolen content, site sprawl, and user apathy.

Regardless of where you are in your information governance journey, the most important thing is to take that first step. Every day, more and more data is being created and the hole you're digging is getting deeper and deeper.

Only by providing a completely guided experience from document creation to site disposition can an organization truly realize the digital workplace.