

# Create, Capture, Collaborate:

Your Content Drives Organizational Value



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# Create, Capture, Collaborate: Your Content Drives Organizational Value

By Peggy Winton CIP, President & CEO, AIIM

If you've been paying attention to the research we conduct and the educational information we share, you know that AIIM describes Intelligent Information Management (IIM) as all the things you want to do with, or get from, your organization's information. We break these up into five key categories of actions or aspirations.



Get the five-domain IIM infographic [here](#)

Obviously, there aren't hard boundaries between any of these – they are dynamic and overlapping – but isolating them helps us drill down into their unique characteristics and capabilities. It also helps identify the skills and the solutions required to achieve the business objectives they enable.

The first IIM category is all about your content – creating it, capturing it, and collaborating with it. We often refer to this as the onramp for the downstream processes that follow. Get this step right, and the subsequent IIM steps will become easier. The goal of this stage is a flexible and modular approach that utilizes content and information wherever and whenever it is needed, independent of where it is stored. As we pursue this objective, it helps to analyze our current state and maturity level against these two key questions:

1. Do you use artificial intelligence to help automatically process and categorize incoming information in all forms as it enters the organization? And do you automatically extract the data and information that is necessary to initiate or drive core business processes? This set of capabilities is commonly known as **Intelligent Capture**.
2. Do you have an explicit strategy and systems to encourage collaboration, especially across virtual workforces and organizational boundaries? These are the ideal attributes of a **Digital Workplace** that leverages Organizational Intelligence.

Let's take a deeper look at these capabilities to see how changing business drivers are impacting their application. Then, with help from contributors in the chapters that follow, we'll see how your peers in a variety of industries are pivoting to meet these new challenges and rising to new levels of content management excellence.

**Capture is shifting from something that is done as an afterthought and with an archive focus to something that must be done as soon as information enters the organization.**

Capture has been part of the content management equation for over two decades and represents some of the most proven and mature solutions. For many years, capture was somewhat of an afterthought. ...It was something focused primarily on paper documents. ...It was something focused on archiving the document rather than on extraction of data from the document. ...It was something you did at some point after information entered the organization. ...It was usually done in the context of one particular business process and needed to be customized to that process. If yours is like many organizations, you now have a hybrid of paper and digital inputs for things like invoices, contracts, claims, receipts, and shipment documents; and you will do so for the foreseeable future. This means that disparate digital and paper information streams need to come together in a single stream in order to be managed efficiently.

“

**AIIM action item:** *Understand the ongoing role that paper plays and where it can logically be eliminated. But also understand where it remains a key element in some customer experiences; focus on digitizing the paper as it arrives.*

”

**Concerns about information privacy and security are increasing.**

The growing complexity of privacy and security concerns means that organizations must: a) govern information from its creation; and b) automate the governance process. Many organizations operate in an environment in which users are encouraged, expected, or required to identify and capture their own information. There is some value to this approach – users are most knowledgeable about their business processes and activities and should be the best-positioned to determine what is important and where to store it. But the reality is something different. In the vast majority of organizations, most users do not identify, capture, and manage their information properly. They simply don't.





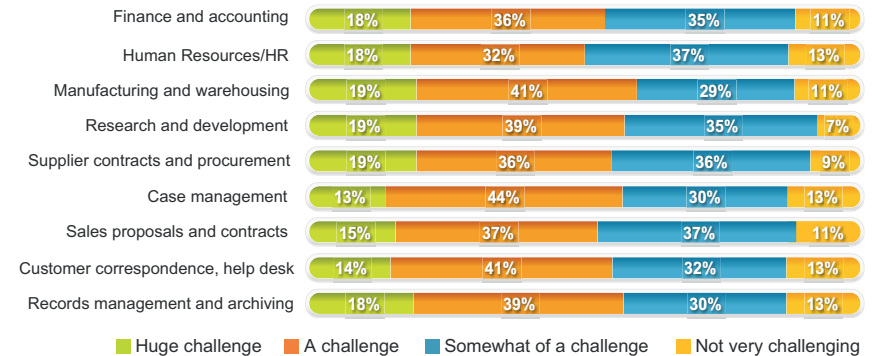
## Automated processing of information is critical to everything that follows.

Intelligent capture is assuming a key role in triggering and automating downstream business processes. That's why it's important to select the appropriate file format for creating and capturing content based on the intended business use. Many document-driven business functions have either reached or are reaching their 'tipping point' for automation – the point where automating processes becomes critical to accomplishing core tasks with high quality and in a timely manner. This is especially the case where organizations are receiving documents through a variety of delivery channels. Organizations are realizing that processes simply cannot be automated until the unstructured information that underlies them is in a machine-comprehensible form.



In over 50% of core back-end business processes, unmanaged unstructured content remains a significant problem.

For each of the following processes, think about how much of a challenge structured and unstructured information represents in your efforts to semi-automate.



Source: AIIM Industry Watch, 2019: [\*"You're Working TOO Hard – Using Intelligent Automation to Save Time, Money, and Effort"\*](#)

“

**AIIM action item:** Before automation and integration of business inputs can occur, consolidate capture capabilities – both at endpoints and at the edge of digital content creation.

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## Advances in artificial intelligence (AI) and machine learning (ML) are changing the capture game.

Radical improvements in capture efficiency and accuracy are driving a reevaluation of legacy capture platforms. Organizations must embrace AI and ML tools to take the friction out of the process of manually classifying incoming information and assigning relevant metadata. The ability to use ML to train systems to identify and extract key metadata and process information from semi-structured and freeform documents is critical to automating the capture process. AI and ML capabilities need to be viewed in two contexts by user organizations. The first is the more traditional context – how these tools are being used, and could be used, to improve business processes and gain insight. But effective AI and ML projects require machine-comprehensible information, and that is the second context – how these tools can be applied to the process of making information machine-comprehensible. This is done by adding context to unstructured information.

“

**AIIM action item:** *Understand that content – in all of its forms, not just documents – is the toughest information type to make machine-comprehensible.*

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## Intelligent capture is key to fully optimizing emerging robotic process automation (RPA) capabilities.

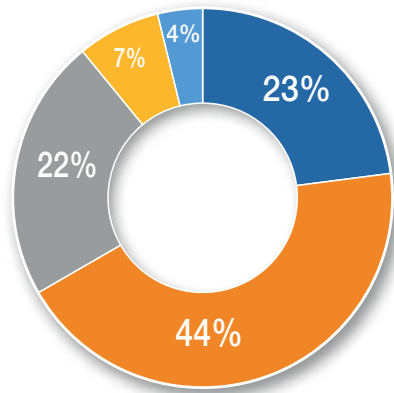
The ability of organizations to fully leverage their RPA investments rests completely on whether these engines can ingest and digest unstructured and semi-structured information. Automatically extracting key data from incoming information streams and using this data to activate process flows is the ultimate objective of Intelligent Capture. This is where technologies like robotic process automation (RPA) can act as a key bridge and extend the life and functionality of legacy BPM and ECM systems, and also extend process automation functionality to a much larger percentage of knowledge workers than is traditionally possible. But RPA engines will only reach their full potential if both the context and the content of information is fully understood and integrated into line-of-business applications.

## Most organizations understand the problems created by overflowing and incompatible information silos and they recognize the need to do something about it.

Whether it's finding the right information an employee needs when onboarding to a new role or ensuring that another employee's work artifacts are captured for future use, retaining, maintaining, and accessing this organizational knowledge can be a key strategic differentiator. Nearly 70% of you agree.

## How important is it to your organization to have an easily curated system for tapping knowledge?

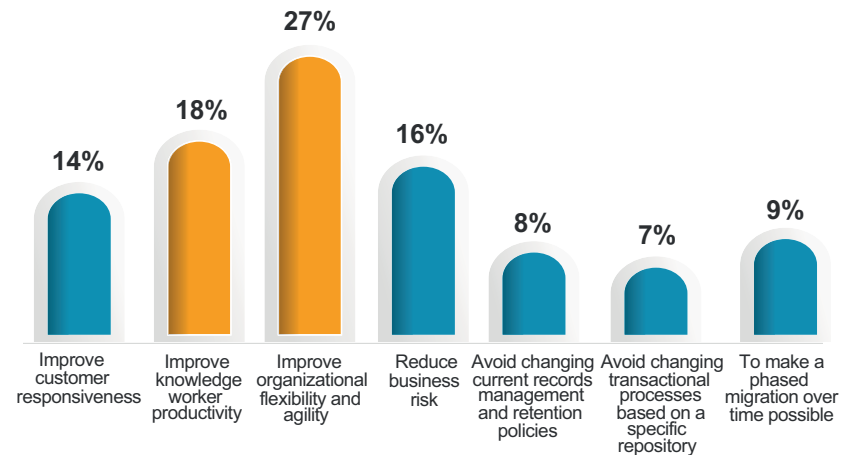
■ Extremely important ■ Very important ■ Somewhat important  
■ Not so important ■ Not at all important



Source: Unpublished data from AIIM's 2021 State of the IIM Industry research

It can also be a BIG challenge for many organizations, largely due to the level of effort required to find scattered and siloed information. In far too many organizations, siloed content repositories and disconnected process applications create an environment in which knowledge workers must act as human system integrators, copying/pasting information from where it is stored to where it is needed. When we asked AIIM community members what the most important reason was for undertaking a content migration initiative, you said to improve organizational flexibility and agility (27%), followed closely by improving knowledge worker productivity (18%).

## What is the MOST important reason to consider a content integration platform?



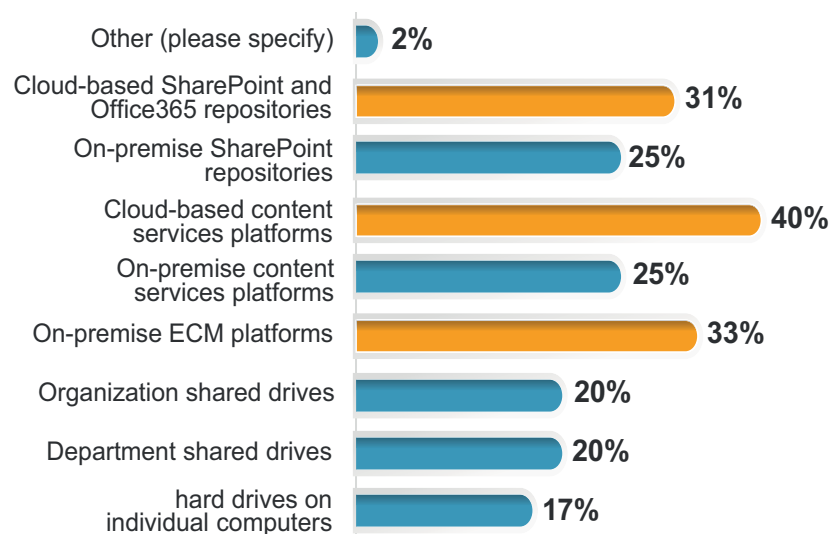
Source: AIIM Industry Watch, 2019: [\*"Building an Effective Strategy for Content Integration and Migration"\*](#)

**The extension of content services to the cloud becomes the logical step forward for a digital transformation that ensures content is consistently available, accessible, and shareable.**

Because of the growing confidence in cloud applications, a shift is emerging where business leaders and department heads are quickly identifying impediments to their teams' effectiveness, and they are not hesitating to introduce cloud-based technology to enhance their departmental operations. They are starting to recognize that the cloud is not just about storage, cost savings, mobile access, and flexibility.

Deploying content services in the cloud represents a unique opportunity to rethink and reconfigure how business processes can evolve to be cloud enabled, which has the potential to enhance personal productivity, customer experience, and overall organization efficiency with solid governance and control.

### Where are you trying to migrate content TO?



Source: AIIM Industry Watch, 2019: [\*“Building an Effective Strategy for Content Integration and Migration”\*](#)

**Naturally, the COVID crisis has forced organizations to rethink how they view remote work, remote workers, and the productivity systems used to support them.**

Rapid adoption of enterprise tools for connectivity, collaboration, information sharing, and knowledge management has enabled thousands of organizations to maintain continuity. It has also presented new levels of complexity. One of the biggest issues to adopting enterprise tools at this pace and scale is that the necessary steps between deployment and full adoption are not always taken. The result: an unmitigated content mess!

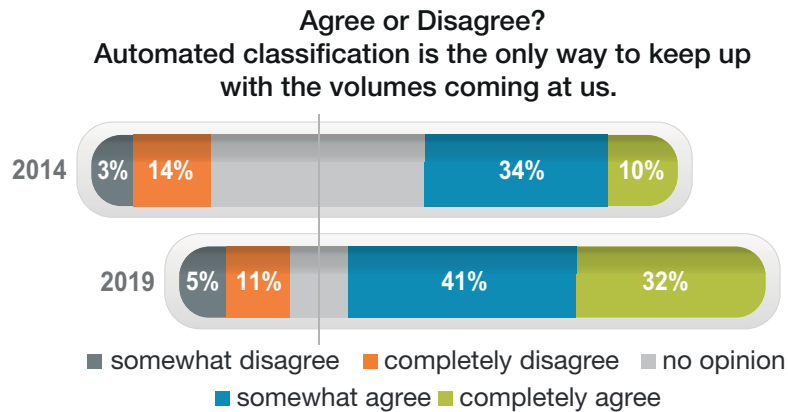
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**From AIIM’s Certified Information Professionals (CIPs) in the AIIM State of the Intelligent Information Management Industry Watch, 2021:** *“You can’t control what you can’t see. For our organization, the problem was not the sheer number of repositories and systems; the problem was not even knowing what we had.”*

”

So, the flip side of information creation and retention is simply getting rid of ROT (information that is Redundant, Obsolete, or Trivial), and doing so safely, confidently, and seamlessly. A big change we’ve seen over the past five years is the adoption of tools to automate this process.

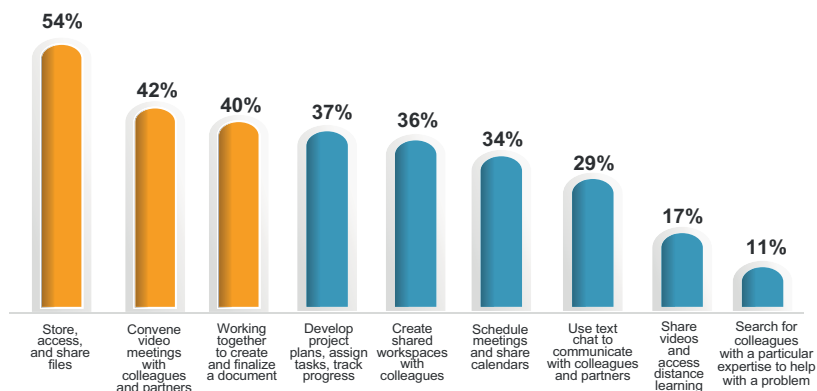




Source: AIIM Industry Watch, 2019: [“Best Practices for Automating Information Governance”](#)

When we look at the kinds of collaborative capabilities that most organizations are focused on, it’s pretty much the basics like file management, video, and content authoring as top priorities; that shouldn’t be surprising in a distributed work environment.

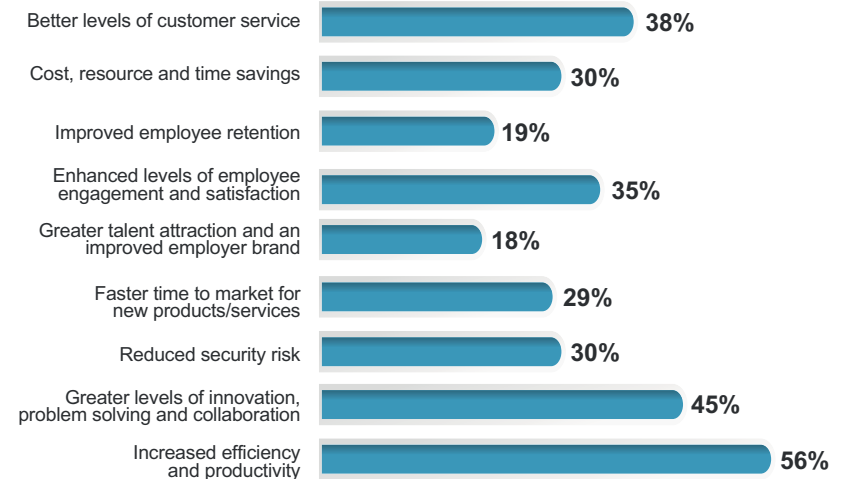
Which three of the following collaboration activities are the MOST critical to your organization in achieving its business goals?



Source: AIIM Industry Watch, 2020: [“Mastering your M365 and SharePoint Investment”](#)

But there is a growing desire to leverage document-centric collaboration for digital workplace effectiveness. Automating how work moves through an organization to support key business processes (particularly those for a demanding customer base) is an area of interest for most.

What are the three most important goals of document-centric collaboration?



Source: AIIM Industry Watch, 2019: [“Implementing a Digital Workplace Strategy”](#)

## Not all Capture and Collaboration Journeys will be alike.

Where you are should determine where you start. Choose a strategy and a platform that can evolve over time. Here is advice for setting the right foundation from the CIP Study Guide:



**1. Identify sources of content to be captured** (e.g., paper, microfilm, email, born-digital, legacy sources such as file shares).



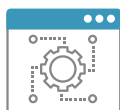
**2. Explain the challenges associated with managing digital information** (e.g., determining what to capture and how, the dynamic nature of some digital information, how formats impact capture and management).



**3. Select the appropriate file format for creating and capturing content based on business requirements** (e.g., target audiences, access to content over time, regulatory requirements).



**4. Determine the impact of using proprietary file formats on information creation, capture, and access.**



**5. Identify specific types of content to capture that provide unique challenges** (e.g., email, social media, forms, rich media) and determine how to capture them (e.g., using a digital asset management system).



**6. Distinguish between structured and unstructured information** and the differences in how they are managed.



**7. Determine methods for extracting and capturing data from structured applications.**



**8. Determine methods for capturing structured data using electronic forms.**



**9. Develop a process for capturing content** (e.g., what to capture, approvals, audits).



**10. Determine strategy for capture** (e.g., dayforward, backfile conversion, on-demand, and factors that contribute to each).



**11. Select the appropriate file format(s) for captured images based on business requirements** (e.g., number of pages, compression, need for Webbased access, need for public access, bandwidth).



**12. Identify issues associated with file conversion** (e.g., between formats, from digital to analog).

# ADDITIONAL READING

**What is Information Capture? Definition, Purpose, and Value**

<https://info.aiim.org/aiim-blog/what-is-information-capture-definition-purpose-value>

**What to Capture VS What NOT to Capture**

<https://info.aiim.org/aiim-blog/information-capture-vs-not-information-capture>

**8 Tips to Create a Data Migration Strategy**

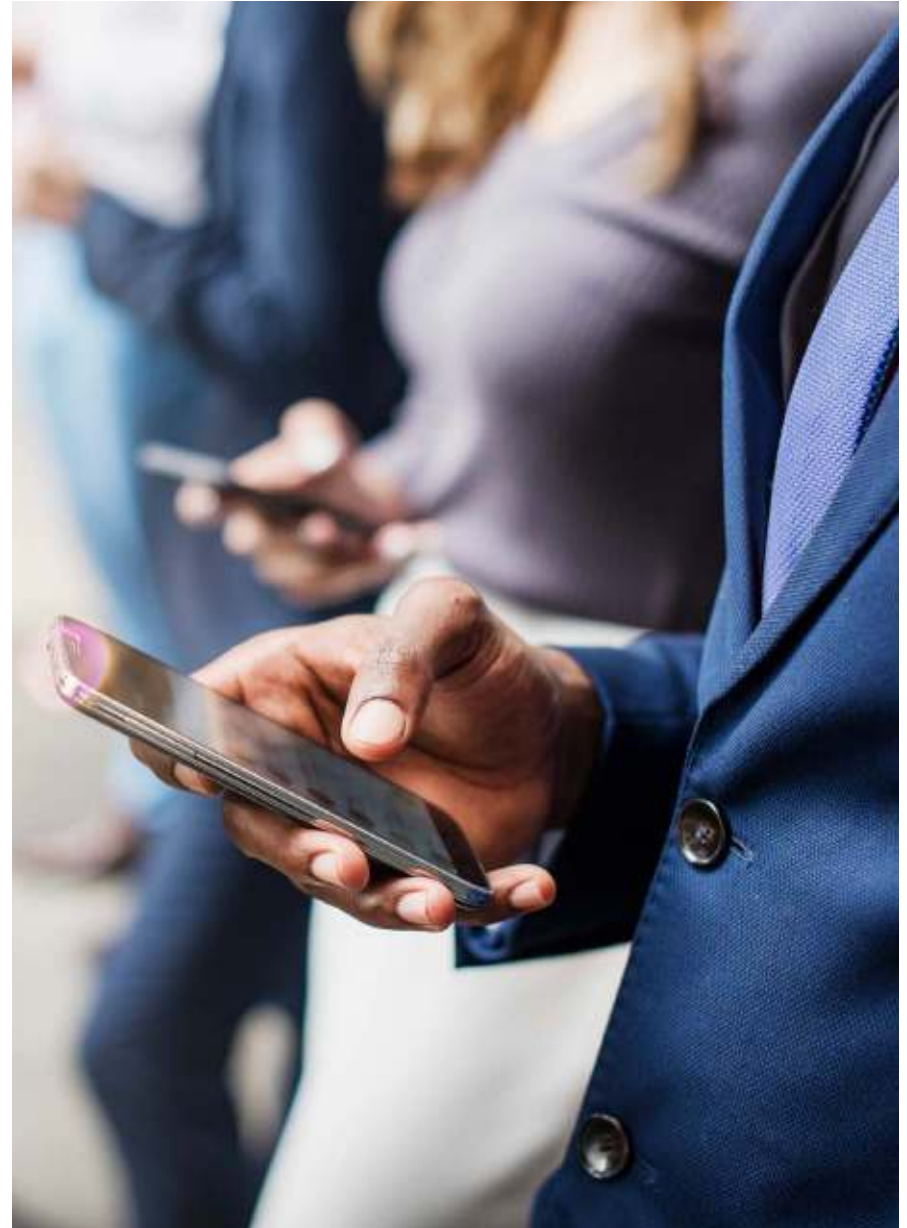
<https://info.aiim.org/aiim-blog/data-migration-strategy-tips>

**Get “Fully Connected” with Your Disparate Systems and Siloed Information**

<https://info.aiim.org/stay-competitive-with-connected-and-flexible-systems>

**Knowledge Sharing: 5 Strategies to Share Knowledge In the Workplace**

<https://info.aiim.org/aiim-blog/knowledge-sharing-strategies-for-the-workplace>





## Overcoming Information Overload in HR

*By Scan-Optics*

It's no secret that organizations today are swamped by information. According to AIIM, [organizations expect the amount of information they must manage to increase by 4.5x](#) in the next 18 months. Add to this the massive and immediate shift to remote working in 2020 and the impacts of information overload compound exponentially.

It's hard to avoid information overload nowadays. And the quantity and speed of that information coming at us is often more than we can handle. The impacts are felt in every aspect of doing business today; [two thirds of office workers say that the volume of data they must manage negatively affects their job.](#)

### Overload Loads Down HR Efficiency

Perhaps nowhere is information overload felt more acutely than in Human Resources. For example, when a new employee is hired the process involves a number of important documents. Tax forms, benefit enrollments, background checks, and employment contracts are common, but there are many others. Indeed, an employee file can grow to hundreds of pages. And despite the increasing digitization of business today, much of this information is on paper.

### New Approaches Win the War on Paper

There are new approaches and technology that give HR some much needed relief from the war on paper. One example comes from Connecticut Governor Ned Lamont, who recently provided an update on the [executive order he signed in 2019](#) directing state agencies to streamline their HR operations in an effort to reduce bureaucracy and implement efficiencies.

**Governor Lamont stated:** *"From digitizing hundreds of thousands of pages of files, to eliminating backlogs, to building new teams with specialized skills, this is a modern HR effort that supports each and every one of our dedicated state employees and an environment that gets work done."*



Josh Geballe, commissioner of the Department of Administration and the state's Chief Operating Officer further added: "This initiative is a great example of the opportunities we have in state government to improve the quality of the service we provide and use technology to help us become more cost-efficient."

## Digitization Saves Millions

At the heart of the effort is the digitization of over 100,000 paper files, totaling over 1 million pages. A study of Connecticut's state government in advance of an expected wave of retirements next year has identified as much as \$900 million in potential savings as a result.

## The Future of Work Is Now

The improvements came at a good time. An added benefit has been centralizing the state's Human Resources team during the ongoing COVID-19 pandemic. This has bolstered the ability of state agencies to work together more quickly. "Our HR team has been a critical part of the pandemic response, ensuring that agencies can quickly work together to address new challenges," added Geballe.

## Moving Forward

What can you do? Scan-Optics helped the State of Connecticut with this important initiative. We enabled the state to take data that was unstructured; then digitized, organized, and optimized the files so they were searchable and easily retrieved through their content management system. To learn more about how we help organizations globally use Intelligent Data Processing solutions to reduce the burden of paper, overcome information overload, and gain a competitive edge visit [scanoptics.com](https://www.scanoptics.com) or see to how it works [in this video](#).



## About Scan-Optics, LLC

Scan-Optics is a leading global provider of cloud based, AI, Intelligent Data Management solutions, professional services, business process management, and support services to B2B, Government, and Higher Education. Our pioneering technology has been shaping the industry by using data technologies paired with cognitive and AI advances to bring you easy. forward™, an Intelligent Data Management solution that captures data securely and accurately!

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