Optimizing Sales and Service Operations with a New Generation of Content Management Tools
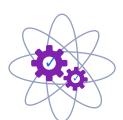
Rethink how ECM can help sales, service, and related teams boost productivity, shorten time to revenue, and delight customers.

The vast majority of businesses (85%) that participated in a <u>recent survey</u> by McKinsey & Company said they accelerated adoption of digital interaction and collaboration tools in 2020. And a significant majority (67%) also reported that they had accelerated deployment of automation and AI solutions to stabilize processes and limit reliance on human intervention.

Although it's easy to attribute this new approach to a time of unprecedented upheaval, this shift is not new—it's simply an acceleration of new work models that have been emerging for a decade now. And it's not going to go away as the global pandemic fades. The number of companies stating that they will continue to allow remote work after safety protocols no longer require it has nearly doubled over the span of a year.

The result? "People are working differently if they're working from home, and they can feel disengaged if they don't have the personal interaction and access to the information they're used to," says Lee Van Cromvoirt, Senior Product Marketing Manager at OpenText™. "The onus is on organizations to provide an infrastructure that drives productivity through better-connected people, content, and systems. Performance across the value chain—accompanied by reduced costs and improved customer satisfaction—has a real opportunity to increase with the right steps."

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That's especially true of information-driven roles such as sales and service, whose effectiveness depends on access to information and collaboration with other departments on everything from contracts to account status, customer history, product inventory levels, and more.

For many organizations, Salesforce® is at the center of all this activity. The perennial CRM sector leader, it has more underline market share than its next four competitors combined. Salesforce is incredibly capable, but it can't support the entire customer relationship alone. In the modern digital enterprise, there is just too much relevant information, created and stored in a wide variety of sources, for any one system to provide all the answers. Industry heavyweights such as SAP®, Oracle®, and the Microsoft® Office 365® suite play significant roles in capturing, creating, processing, and sharing all the information that results in a rewarding, profitable customer experience.

For the aforementioned newly remote workers tasked with supporting sales and service activities, it's often a challenge to access and navigate all these essential channels from dispersed locations. Screen flips, multiple logins, temperamental connectivity, and even lack of convenient access to subject matter experts can dramatically slow and even derail the sales and service process. Revenue can fall short of projections if, for instance, sales departments miss opportunities due to a lack of complete customer information. Call center dissatisfaction can also increase as service agents stumble in the absence of timely information such as case progression or order status.

The challenges of this shift extend beyond customer-facing activities into core operational and policy issues supporting them. IT departments spent most of 2020 trying to adapt aging infrastructure built for one operational model to not just cope but also succeed in a completely different model. Access to on-premises systems could be brittle and was easily overwhelmed. Process continuity wavered as information flows broke down. And, of course, information governance protocols and policies became an afterthought as resourceful workers utilized whichever method best worked to access and share information across teams and functions.

Change Requires a New Approach

It's clear that there needs to be a new approach, a rethinking of the strategy and practice behind information management.

That's where the next generation of enterprise content management (ECM) solutions—content services platforms and applications—comes in. Content services is not a singular thing; it's a series of platforms, applications, and components designed to layer over an existing content management infrastructure and expand the access, use, and control of almost everything that could be defined as enterprise information.

Each content services element is purpose-built to perform a specific function. Some integrate with the standalone platforms at the heart of business processes to introduce lifecycle management to isolated pools of information. Some facilitate the distribution of that information through interfaces and workflows. Others focus on targeted tasks such as automated capture, archiving, file-sharing, or even something as complex as translation.

The leading content services applications are cloud-based but utilize containerized architecture, making them easily adaptable to any deployment environment. Implemented on an as-needed basis to meet unique business cases, they work together to create a holistic framework, connecting a central content management hub to information sources and enabling the identification, classification, and distribution of content and data. With these connections in place, governance policies are applied at the source, as information is ingested or created, and accompany it throughout its lifecycle.

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Here's a simple example: An existing content management platform implements content services applications to integrate with Salesforce and SAP. With centrally defined rules, the content and data in both systems are analyzed and metatags are applied at the item level. Relational context can now be created: Data related to a customer in SAP can be linked to that same customer's content in Salesforce. Almost right out of the box, SAP data can be automatically retrieved and surfaced in Salesforce when a customer service representative opens a customer's file—all under the oversight of governance rules that define which data the CSR can see and what that person is allowed to do with that information.

Now expand that out to also include something as ubiquitous as the Microsoft Office 365 suite or any variety of other leading applications, and you can see the effects start to blossom. Remote sales and service workers can log into the system of their choice and automatically receive accurate, relevant information drawn from across the enterprise to support their exact activities.

"An effective integrated content management system must be platform-agnostic," says Bernd Hennicke, Senior Director, Strategic Ecosystems at OpenText. "So, while it can power all this great interactivity for Salesforce, for example, it needs to do exactly the same with SAP and Microsoft."

Integrate Enterprise Content Management with Sales and Service

Once in place, content services technology can benefit organizations in just about every industry, including healthcare, energy, education, government, manufacturing, financial services, and more. Here a few examples:

- The wealth management arm of a large financial institution uses ECM integrated with Salesforce to manage records and meet regulatory compliance obligations.

- A Canadian water utility serving more than four million residents introduced a Salesforce integration (including Salesforce's Community Cloud platform) to deliver documentation to service agents and directly to end consumers, cutting costs and time allocation for Customer Service.

- A healthcare diagnostics manufacturer integrated its ECM platform with Salesforce to provide access to the latest versions of marketing collateral for sales agents, partners, and other parties.

- Thanks to an ECM integration with Salesforce, contact center agents at a 200,000-member federation of teachers now have instant access to sensitive member information to aid in processing benefits claims, managing pensions, and carrying out other critical functions.

- A leading robotics manufacturer uses integrated content services applications to streamline operations. Integrations with SAP and Salesforce enable internal teams to share documents such as communications with suppliers, sales collateral, and spec sheets to keep everyone on the same page and contribute insights. Among other benefits, the system enables sales teams to more quickly identify up-sell opportunities.

An effective content management platform integrates with the tools that Sales and other departments use every day. This enables all stakeholders to seamlessly view and interact with customer-facing content that remains up-to-date and easy to access from within their usual workflows. Integrated content services applications drive deeper insights that help surface more opportunities, generate greater customer loyalty, and build better relationships.

Simply put, process and workflow efficiencies across Sales and other areas of the organization that depend on collaboration can turn into significant competitive advantages.

New Workplace Realities, New Sales Enablement Opportunities for Content Management

In the not-so-distant past, enhancing content usage for sales and service may have simply meant providing access to static documents on handheld devices to sales teams in the field. The events of 2020 introduced a whole new level of challenges and opportunities, spotlighting the need for more content automation and dynamic information flows that give workers better context and insights across end-to-end business processes.

In today's environment, the question for sales and service departments becomes "How can we provide better customer experiences and be more competitive?"

Ideally, enterprises should integrate content management capabilities with the systems their people work in every day. That should include all the heavy hitters such as Salesforce, major ERP systems, and productivity suites such as Microsoft Office 365 and Microsoft Teams. It's the only way to ensure that sales and service teams can see the whole picture when it comes to their customers and the products they support across the entire enterprise.

Today's sales professionals work in multiple ways, requiring personalized methods of managing critical documents, accessing supporting information, and sharing that information with stakeholders and customers. And that means that document repositories with only rudimentary connections to business applications often can't keep up. "Improving governance—getting arms around all the information across the organization—and giving, for example, the sales organization a place to capture, access, and manage information from one spot are vitally important," Van Cromvoirt says.

Integration such as this also gives users the seamless ability to automatically access content on demand inside one system. Information can be surfaced for them while processes are happening in real time. Removing the need to search for missing pieces of the puzzle now gives sales and service professionals a powerful new edge—promoting heightened situational awareness, increased productivity, and better collaboration capabilities when engaging customers and partners.

An integrated content management platform can also help organizations:

- Retain more customers, thanks to integrated contracts, support documents, and customer records that enable service departments to provide a better customer experience
- Remain competitive through streamlined bidding and contracting processes that shorten times to completed deals
- Optimize the sales organization with integrated marketing materials and collaboration tools that put answers at the fingertips of agents working with customers
- Bring together global, disparate teams

Getting Started: The Path to Sales and Service Excellence

Although one of the strengths of an integrated ECM system is its ability to scale across all enterprise functions—connecting people, content, data, and tasks—organizations shouldn't try to do it all in one step. History has shown that that's a recipe for scope shift, decision paralysis, and missed expectations. Instead, start with a single, achievable use case with an easily definable scope to demonstrate success, keep costs manageable, and build the case for further implementation. "We tend to see customers start with a reason to deploy small," Hennicke explains. "Quite often that's contract lifecycle management."

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An integrated ECM system can enable a contract to be visible to multiple departments during sale negotiations and service activities. For example, a U.S. hardware/software company uses content services applications to share statements of work and financial documents generated by the sales department with service teams in the field. This eliminates duplicate records, helps keep projects on track, and ensures compliance with agreed-upon terms. Integration through content services applications can also boost call center efficiency.

Organizations in highly regulated industries such as healthcare or finance might start their integrated content management deployment in areas where compliance is a concern. "Integrating content services applications with existing ECM mitigates risk by extending governance policies to the majority of content and data across the enterprise," Hennicke notes. For example, an integrated ECM system can control who has access to what documents, while keeping an audit trail of who opens, reads, modifies, or shares them—and when—in turn assisting with compliance reporting.
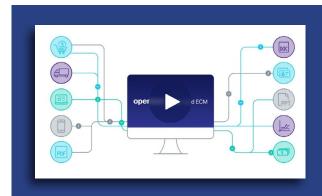
Cutting Through Complexity

Digital transformation has accelerated as more organizations adapt to the need for increased agility and resilience in response to rapid changes in the business climate. The rapidity of change is unlikely to abate anytime soon, driving the need for more people to collaborate and make decisions with the help of more information from more places than ever.
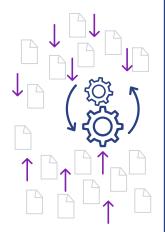
Organizations that don't adapt quickly enough risk getting left behind. Even as they adapt, enterprises must keep their sales and other departmental users productive while generating more business and keeping customers happy. These realities call for new content management capabilities—capabilities provided by content services technology.

Transitioning to a fully integrated content management framework doesn't have to be complicated. Advancements in cloud-based technologies give organizations more options critical to faster line-of-business digital transformation, all while providing the flexibility and scalability required to fit the unique needs of any organization. Sales operations, for example, can benefit from system integration almost immediately, since users don't have to learn new software, yielding benefits for users and the enterprise as a whole from day one.

That's especially true for organizations with one or two pieces of the complete integrated ECM puzzle already in place, as Van Cromvoirt explains: "For organizations undertaking digital change, if they have just the Salesforce piece and are looking to replace a legacy content services platform, Extended ECM Platform from OpenText can start returning results quickly."

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CLICK HERE to watch a video "A day in the life of a Sales Professional", optimizing sales cycles with OpenText Extended ECM for CRM.

Integrated Content Management for Serious Sales and Service Organizations

OpenText™ Content Services solutions provide purpose-built integrated content management attuned to the new realities of the market and the workplace, giving users and customers the best experiences possible.

They offer an intelligent business workspace approach, connecting structured data, unstructured content, people, and tasks through customizable user interfaces. This provides a seamless user experience and enhanced productivity and helps bring deeper insights to sales and other professionals. It also adds context to content at the time of need and fosters more-effective collaboration, contributing to a better experience for customers, partners, and enterprise teams. For users, OpenText provides transparent integration with all the standard enterprise productivity suites, enabling them to view documents, notes, and more from within the applications they use every day. Integrations working in the background—collectively called Extended ECM—enable users to quickly adopt new work habits, because they don't have to learn new applications.

For the enterprise, OpenText allows for seamless sharing across as many departments as required to expedite sales, service calls, and more. At the same time, OpenText provides a single source of truth for content such as marketing collateral, statements of work, and contracts, aiding compliance and fostering broader continuity and collaboration. For example, users can leave comments for each other attached to documents to include information such as special instructions from customers.

OpenText™ Content Services platforms and applications offer:

- Deep and mature integration capabilities that enable seamless collaboration within Salesforce CRM, Microsoft Office and Teams environments, SAP business software, and more
- A business workspace approach that adds intelligent context to content, surfacing it at the time of need to enable faster, easier collaboration
- Automation that accelerates processes, minimizes manual tasks and errors, and boosts employee and organizational productivity
- Records management and information governance that enhances security, reduces risk, and helps ensure regulatory compliance

It's time to rethink how information is used to fuel change. OpenText provides connectivity of critical content with CRM and other systems to accelerate and optimize processes already in use across the enterprise, all while keeping ahead of the competition—regardless of the market climate.

Visit **www.opentext.com**

See how **OpenText Extended ECM Platform** integrates Content Services with lead applications like **Salesforce** and **Microsoft** to bridge content silos and expedite information flows to supercharge productivity for Sales & Service processes.