Taking the leap into the Modern Workplace

Follow the Path of the Wise....

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Neal Fischer

- Business Process Automation Consultant / Digital Transformation Specialist
- Business Owner – Founded CommTech of SD & Hershey Technologies. HTI was a 24 year business focused on business process automation solutions. Sold to Konica Minolta Business Solutions in 2015.
- Family man, Love San Diego and Obsessed w/Customer success, Focus on client Solution & Create Long-term Relationships
Abbreviated Client Listing

**Insurance & Finance**
- Manitoba Public Insurance
- ICBC
- AAI
- Dodge & Cox
- Brandes Investment Partners
- American Specialty Health Plans
- Wawanesa Insurance
- Preferred Employers Insurance Company
- Brandywine Global

**Commercial & Healthcare**
- eBay
- KSL Resorts
- Ceradyne, Inc.
- Level 3 Communications
- Prime Healthcare Services
- The Irvine Company
- Cubic Corporation
- NVA National Veterinary Associates
- Macro Plastics Inc.
- Big 5
- Delcom Telecom
- Boeing
- Accenture
- EventNetwork
- San Diego County Sheriff’s Department

**Government**
- San Diego Utilities
- County of San Diego
- County of Los Angeles
- MTA Metro
- OCTA
- San Diego County Sheriff’s Department

**Public Utilities**
Modern Workplace & 4th Industrial Revolution

- Improve business processes
- Customer engagement
- Develop new capabilities and business models by using connected digital processes and or platforms.

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<th>1st</th>
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<tbody>
<tr>
<td>Mechanization, water power, steam power</td>
<td>Mass production, assembly line, electricity</td>
<td>Computer and automation</td>
<td>Cyber Physical Systems</td>
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Why Are Organizations investing in Digital Transformation & how it affects the way people work?
Can your Business Model Survive by Staying Status Quo?

URBAN TRANSPORTATION

SPACE TRANSPORTATION

HOSPITALITY

Pharmacy Chain

Telecommunications

Retail

ENTERTAINMENT
DIGITAL TRANSFORMATION SUCCESS DEFINES TODAY’S LEADERS

Digital Natives are Digital Disruptors....
2016

IDC Reports
- Firms will businesses will spend 1.8 Trillion dollars by 2021 to modernize IT platforms in order to support customer centric digital engagement.
Trends Driving Digital Transformation

- Mobility has changed everything
- Customers live in the always-on, app-driven world.
- Access to information and frictionless customer engagement must be delivered 24/7 across myriad touchpoints and line of business applications.
- Winners will be decided by their systems of engagement - speed, flexibility, and ease of adoption.

"By 2019, U.S. customers' mobile engagement behavior will drive U.S. mobile commerce revenue to 50% of U.S. digital commerce revenue."

Mobile will affect more than just digital operations; it will transform your entire business.
Organizations are struggling to integrate new mobile technology with existing legacy systems.

Current legacy systems do not easily scale, often relying on manual non-integrated component systems.

Customers, constituents and business partners are more demanding.

Lower cost / highly skilled Service Providers (BPO)

Disruptive competitive threats.

Subscription Services – Flexible Engagements
Business challenges...

Acquire, retain employees, clients, business partners and expand IT support capabilities

Streamline operations to be more cost effective and compliant

Improve the client engagement experience

Can both be achieved together?
Old IT World

On-premises / Private cloud

Costly & complex

IT deployments lacked ability to improve overtime.

Required on-going LOB expertise and funding to support SW Upgrades.

Often disruptive to user community.
New Modern World

Deployment Options
Multi-Tenant Cloud, SAAS, BPO, On-premises / Private cloud

One Cohesive
Customer Centric
Interoperable
Digital Platform
New Modern World

Deployment Options
- Multi-Tenant Cloud
- SaaS
- BPO
- On-premises / Private cloud

Connected Devices & Platforms
New Modern World

- Cloud SAAS, On-premises / & Private cloud
- Agile Subscription Service on Demand Engagement
- Increased Use of BPO Services
- Best of Breed Line of Business w/ COTS Connectors
- Client Focused Engagement
New World

On-premises / Private cloud
Where to Start?

Remove & Replace entire Business Platforms, Line of Business Applications, Middleware Components, Outsource?
1. Define your organizations roadmap. What does DT mean to you? Who in the organization is most affected?
2. Engage cross-functional teams to create modernization road map to ensure visibility, shared vision and access to SME’s and extended stakeholders.
3. Audit existing infrastructure and LOB applications that are constraining the speed and flexibility of the organization.
4. Be open to change .....review new models to meet IT service requirements.
5. Adopt a services mind-set. Consider SAAS, BPO, and minimize risk through partner engagement (FSR, POC) to validate investment value
6. Audit system and user requirements for BARE minimum offerings focus on being agile, with shorter IT lifecycles and user centric focus.
7. Customer and worker value should be measurable: retention, user experience, productivity, improved recruiting, increased sale$.
8. Acknowledge that tomorrow’s IT Systems will be deployed faster with lower complexities.
9. Build in funding for user training, & on-going system optimization.
Sample Digital Transformation Service Markets

Component Approach

Content Services (ECM) Providers

Systems that collect, manage, search, share and deliver content: images, text, rich media via multiple channels.
ERP Accounting Systems
that support enterprise resource planning focused on financial, services and manufacturing process management tools.

Digital Transformation Opportunities include use of capture, workflow and content mgt services.
Robotic Process Automation (RPA) that support a digital workforce designed to replace redundant manual often “error prone” human tasks. RPA “bots” are often rules based processing models designed to follow structured computer pathways interacting with business applications that have high transaction rates.

Focus on Outcomes not labor reduction
- Client engagement/ experience
- Improved Quality
- Higher staff productivity

## Table 1: Indicative Listing of Types of RPA Tool Vendors

<table>
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<tr>
<th>Specialist RPA Software Providers</th>
<th>Software Providers With Including RPA</th>
<th>IT or BPO Service Providers That Provide Proprietary RPA Software Platforms</th>
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<td>AutomationEdge</td>
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<td>Automation Anywhere</td>
<td>HelpSystems</td>
<td>Cognizant</td>
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<td>Blue Prism</td>
<td>Infosys (EdgeVerve Systems)</td>
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<td>WorkFusion</td>
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<td>NTT Advanced Technology (NTTAT)</td>
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BPO = business process outsourcing; RPA = robotic process automation

Source: Gartner (June 2018)
CRM Systems
that support enterprise customer relationship management with marketplace that offers information sharing with other line of business applications.

Digital Transformation Opportunities include use of digital document generation, analytics, workflow and content mgt services.

Ranked #1 for CRM.

Ranked #1 for CRM Applications based on IDC 2018 Revenue Market Share Worldwide.

Providers that collect/capture content from multiple channels (fax, paper, forms, email, WEB portals) and deliver in an actionable digital format.

**Software Providers**
Kofax, Hyland, EpheSoft, IBM DataCap, Oracle OpenText, Abbyy, Psigen, Google,

**MFP & Scanner Mfgs** – Sharp, Konica Minolta, Xerox, Ricoh, Brother, Lexmark, Canon, Kyocera, Fennastrae Udocs

**BPO Capture as Service Providers:**
Exela Technologies, Iron Mountain, SwissPost,
Digital Workforce SW System

Automatic classification - removes the need for document analysis and sorting. Learn-by-example machine learning techniques make this quick to configure and simple to maintain.

1. Understand the categories
2. Gather samples
3. Training a Machine Learning System
4. Classify unknown documents
Digital Transformation Services

- Automatic Classification & data extraction – removes the need for manual sorting & data entry
- Scan paper documents and import electronic documents from multiple channels – email, FAX, Web Portals, & File Systems, Mobile Devices, WEB Service API’s
- Mature OCR extraction technology locates and extracts data from any document
- Highly scalable recognition engines – Form ID, machine print, handprint, mark sense, barcode (1d,2d)
Content Services Platform Based Approach to the Modern Workplace

**Systems of Engagement**
- Exchange Online
- SharePoint Online
- OneDrive for Business
- Delve
- Yammer
- Skype for Business
- Microsoft Teams
- Office 365 Groups
- Office Graph

**Office 365**
- Word Online
- Excel Online
- PowerPoint Online
- OneNote Online

**File Plan Management**
- Long Term Preservation
- Legal Holds

**Centralised Management**
- GDPR
- Barcode Management

**Physical Records**
- Exporting & Importing

**Security**
- Social Records

**Connectors Framework**
- RESTful API

**Automated Policy Engine**
- Insights and Intelligence
- Machine Learning
- Forensic Analysis

**Content Applications**
- Dropbox
- Box
- Adobe
- Salesforce
- Microsoft Dynamics 365
- Office Graph
- Office 365 Groups
- Office 365
- Exchange Online
- SharePoint Online
- OneDrive for Business
- Yammer
- Skype for Business
- Microsoft Teams

**Insights and Intelligence**
- Forensic Analysis
- Machine Learning
- Automated Policy Engine

**Centralised Management**
- Physical Records
- Security
- Connectors Framework

**File Plan Management**
- Long Term Preservation
- Legal Holds

**System of Record**
- Office 365
- Content Applications

**Insights and Intelligence**
- Forensic Analysis
- Machine Learning
- Automated Policy Engine

**Files and Records**
- Exporting & Importing
- Social Records
- RESTful API

**Connectors Framework**
- Dropbox
- Box
- Adobe
- Salesforce
- Microsoft Dynamics 365

**Office 365**
- Word Online
- Excel Online
- PowerPoint Online
- OneNote Online
Platforms that can now Manage any content source

Content Repositories
• High friction information governance
• Content growth can be difficult to manage individually
• Rapidly deploying new workspaces for information creation
• Focus on creation and accessibility, but aren’t compliant
• Often driven by line of business, not enterprise

Content Service Options
• Records Management as a Service
• Unified policy, fully automated
• 1st and 3rd party connectors via Connector Gallery
• Federated IM achieves global compliance
• Extensible platform

Management App
Physical App

Search

Connector and API Framework
Rules Engine
Retention and Classification
Analytics and Intelligence
Pluggable Storage Layer

Security and Auditing

Public or Private Cloud
Compliance and Security

Seek suppliers that offer platforms and services to meet the following standards

- ISO 16175
- ISO 15489
- ANSI
- IS40
- SOX
- VERS
- 21 CFR Part 11
- HIPAA
- NARA
- MoReq 2010
- FIPS 140-2

- Platform providers with data centers are certified to the highest industry standards ensuring your data is safe
- Options include global locations to co-locate your records in the same data center as your content services tenant
- All traffic between Records365 is encrypted
- Seek suppliers that have passed a minimum of SOC2 Type 1 and Type 2 Certifications
Sample Digital Transformation

AI & Mobility DT Use Cases