

# AIIM 2022 State of the Intelligent Information Management Industry:

*It (Still) All Comes Down to the Customer*



# AIIM Industry Watch Report

As the leading non-profit association dedicated to nurturing, growing, and supporting the information management community, AIIM provides year-round independent research, training, and certification for information professionals. Over four years ago, AIIM introduced the concept of Intelligent Information Management (IIM) and began researching the connections between IIM practices and Digital Transformation. AIIM's Industry Watch research program looks at the key information-centric drivers impacting Digital Transformation initiatives and the application of IIM tools and technologies to Digital Transformation success.

The four core IIM capabilities that provide the structure for [AIIM's Certified Information Professional \(CIP\)](#) program and inform the conclusions presented in this report:

- 1) **Creating, Capturing, and Sharing Information**
- 2) **Digitalizing Information-Intensive Processes**
- 3) **Extracting Intelligence from Information**
- 4) **Automating Governance and Compliance**

AIIM is proud to provide this research at no charge to our members. In this way, the entire community can leverage the education, thought leadership, and direction provided by our work. As such, we are thrilled to see these findings distributed as widely as possible. You can help us spread the knowledge by sharing a link to the report with your extended network. Feel free to use individual elements of this research in your presentations and publications with the attribution — © AIIM 2022, [www.aiim.org](http://www.aiim.org).

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## About the AIIM Community

While we value the support we receive from the IIM solution provider community, we maintain our objectivity and independence as a non-profit industry association. The results of the survey and the market commentary made in this report are free of any bias from the vendors in this space.

### The Sample Size and Demographics

In this report, we discuss the state of information management within organizations, based on research conducted in February 2022, with 265 decision-makers drawn from the AIIM community. The importance of this being an “AIIM-exclusive sample” cannot be over-emphasized. These are the executives and practitioners within organizations that have the best sense of **the gaps that exist between information management good intentions and information management realities.**

The data shared in this report is just a small sample of the total data collected. Access to the full set of findings is reserved for the underwriters.

Number of Employees	
1-99	18%
100-1000	29%
Over 1000	53%

Role in Organization	
Information Management Specialist (records, documents, governance, content)	48%
Information Technologist	28%
Line of Business/Process Owner	24%

# CIP Contributors





## CIP Contributors

We thank these IIM leaders – all [Certified Information Professionals \(CIPs\)](#) – for sharing their expertise and time to vet these results and provide real-world context to them. Their input was gathered in a virtual panel discussion convened in March 2022, just after the survey responses were collated. Their comments have been captured in the final section of this report.

To ensure confidentiality and candid perspectives, it was agreed that direct quotes would not be attributed to the individual CIP contributors. Their perspectives are theirs alone, and do not reflect those of the organizations they represent.



**Jenn Coast, CIP - Project Coordinator, Information Technology Services, The University of Texas at Austin**

Jenn is an information strategist, architect, and wrangler with more than 20 years' experience spanning all stages of the information lifecycle. She provides records management guidance to IT service owners and helps organizations develop information management solutions to improve both the business value of information and the customer experience.



**Julie Harvey, CIP - Sr. Director Employee Experience Technology Lead, Discount Tire**

Julie's 30-year career began in Risk & Claims Investigations where she learned the foundational elements of Risk Management. She is a contributing member of ACT (Agency Council on Technology) launching "Transformation Station," the first Single Entry Multi-Company Interface in the insurance industry. Julie currently leads the Information Lifecycle Management (ILM) program including developing the privacy team for Discount Tire.



**Kelly Husleag, CIP - Manager of Information Governance and Land Management, Gibson Energy Inc.**

Kelly uses her Certified Information Professional credentials and leadership skills daily. She has over 25 years in Information Management and is passionate about risk-based information management, Indigenous Relations, and People Development.

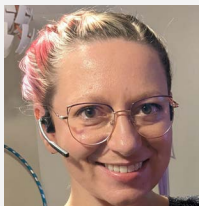
## CIP Contributors



**Candace McCabe, CIP, CIPM - Sr. Solution Architect, Global Technical Platforms, Walmart**  
Candace has designed, implemented, and managed Information Governance and Information Privacy programs for Fortune 400 companies. An expert in data and enterprise architecture, she is currently working as a product owner for a machine learning based forecasting application and has helped architect and manage its outcomes.



**Barry Primes, CIP, BBM, CFRM - Records Management Officer (RMO), Harris County Appraisal District**  
Barry is the Records Management Officer at the Harris County Appraisal District in Houston, Texas. He has over 30 years of Records and Information Management experience. He retired from the National Archives and Records Administration (NARA) as a Senior Records Management Analyst and is a Certified Information Professional (CIP) and Federal Records Manager (CFRM).



**Agata Wszolek, CIP - Manager, Record & information governance, Haventree Bank**  
Agata is an Information Governance Manager at Haventree Bank with a decade of experience in implementing innovative document and information management solutions. Agata is passionate about understanding business problems, finding the best solution, and translating the requirements between the business and technology groups for smooth implementations.





# The Context



## The Context

It has been five years since AIIM first gathered its Leadership Council in workshops designed to collectively define and articulate what our industry means by Digital Transformation. Back in 2017, we concluded that at the heart of EVERY Digital Transformation journey was the need to understand, anticipate, and redefine internal and external customer expectations. Research conducted by Forbes the following year affirmed our work and our conclusions, adding that true Digital Transformation leaders are those that make it EASY to do business with. In tapping into the AIIM end user community, we found impressive examples of that philosophy at work in leading organizations like Farmers Insurance, Ogilvy, and UnitedHealth Group. These organizations had already realized what the Forbes concept of EASY meant: that our products/services mustn't be lame. Rather, they must enhance or simplify our customers' lives and that we must be able to deliver those products in the way that our customers want to consume them.

“

*True Digital Transformation leaders are those focused on making it easy for the customer/supplier/partner to do business with them. - [Surviving Digital Disruption](#)*

”

The AIIM community seemed to get this universal aspiration; we certainly banged that drum loudly enough in myriad reports and presentations in the years since. That message got an even bigger boost (pardon the pun) in 2020 when the pandemic-induced customer demand for convenience, speed, and availability quickly revealed which businesses were able to satisfy their customers and which ones were not. Now, two years later, the customer expectations bar continues to rise. Executives in every industry sector feel this pressure and they are motivated by it. It is no wonder that they throw their support and financial resources behind those activities that are tied to the higher-order goals of innovation, revenue, and profitability, driven by customer demand and loyalty.

**If this endgame is obvious, why do information management professionals still find it difficult to pursue the information-centric activities that will achieve it?**

AIIM research conducted in early 2021 exposed the lingering weak points in most organizations' information management and information governance strategies and practices. The study's overarching conclusion was that there is still a sizable disconnect between those strategies/practices and BUSINESS strategies/practices. In fact, we asked the AIIM community to assign a grade to their respective organizations when it comes to effective linkage between the two. Overall, respondents in last year's survey gave their organizations an alignment grade of C-minus. Yikes!

A strongly implied reason for the disconnect was that no senior leader was given the highest enterprise-level responsibility for information management. Similar feedback cited the dismissive role/status of information overall in organizations – that it isn't currently perceived as a key enterprise asset to be valued.

In attempting to offer more actionable and operationalizing advice, we urged the community to stop looking at information management solely through a tactical cost minimization filter. Rather, we said, they should adopt a broader, holistic, and multidisciplinary approach to assess and balance both risk and value of information. Now, a full year later, we see only incremental improvement in the overall status of information management/governance in business. That sobering revelation forced us to question whether last year's conclusions and advice were too broad, too idealistic, and too neglectful of THE critical cornerstone of our mission.

## [AIIM 2021 State of the Intelligent Information Management Industry: a wake up call for organization leaders](#)

And so, in February of this year, we asked community members to consider again the grade they'd give their organizations when it comes to executive alignment of information management/governance strategies and business strategies. We probed the different mindsets and approaches of those who have remained at status quo or worse and those who have seen improvement. ***This is where things got interesting – yet should have been obvious before. The difference in outcomes directly depends on the degree to which customer experience is the goal and the focus of information management efforts! Plain and simple.***

We believe that the data included in this report sheds important light on how we tend to lose sight of this reason for our practice and why. It highlights four important findings that information management/governance professionals and their stakeholders should consider if they want to fully leverage their most powerful asset (information) to fuel their digital transformation journey – with a singular focus on customer experience:

1. The spirit is willing, but the flesh is weak. Despite good intentions, we can't seem to get out of our risk/compliance comfort zone.
2. An information management/governance program focused on risk/regulations/compliance ***fails*** to move the needle in the right direction.
3. Leveraging information for improved customer (internal and external) experience is the mantra adopted by those organizations reporting ***good*** and ***improved*** information management/business alignment.
4. A holistic approach is ideal. However, a focus on information access, process automation, and data extraction/analysis are the most effective way to fully leverage customer-centric Intelligent Information Management capabilities for immediate, incremental wins.



### **Additional reading from Microsoft:**

The experience of the past 2 years has changed how we define the role of work in our lives. Read the [Microsoft 2022 Work Trend Index report](#) to learn about the five urgent trends you need to know to help navigate this shift and meet employees' great new expectations.

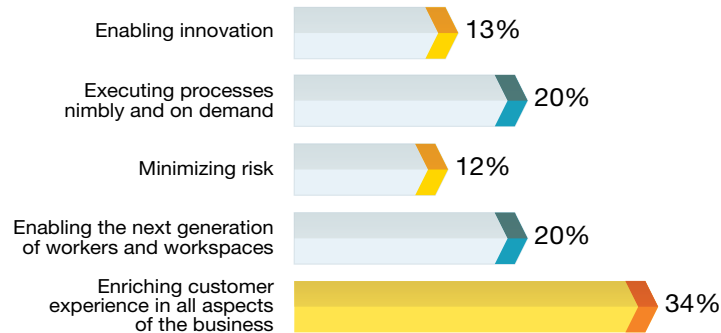
# Finding 1 – The Spirit is Willing, but the Flesh is Weak



# Finding 1 – The Spirit is Willing, but the Flesh is Weak

Regardless of how weary we’ve become of the phrase “Digital Transformation,” it is still the top business imperative of our day. The events of the past two years have only accelerated the need to create, hone, and execute a strategy accordingly. That takes a commitment to embracing change and look for new ways to accomplish goals. In revisiting general community attitudes around digital transformation and stakeholder support, the data indicates an increasing awareness of the key success factors:

## What do you think is the MOST IMPORTANT ingredient in your digital transformation strategy? N=265



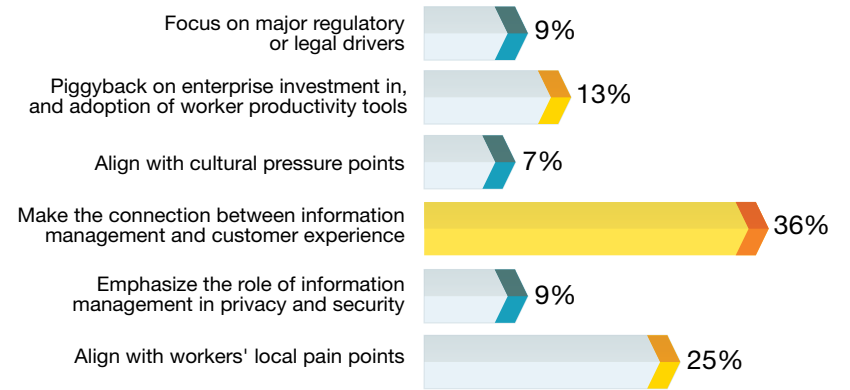
Thirty-four percent – the highest across all choices – said “enriching customer experience in all aspects of the business.” Good answer!



### Additional reading from Precision Content:

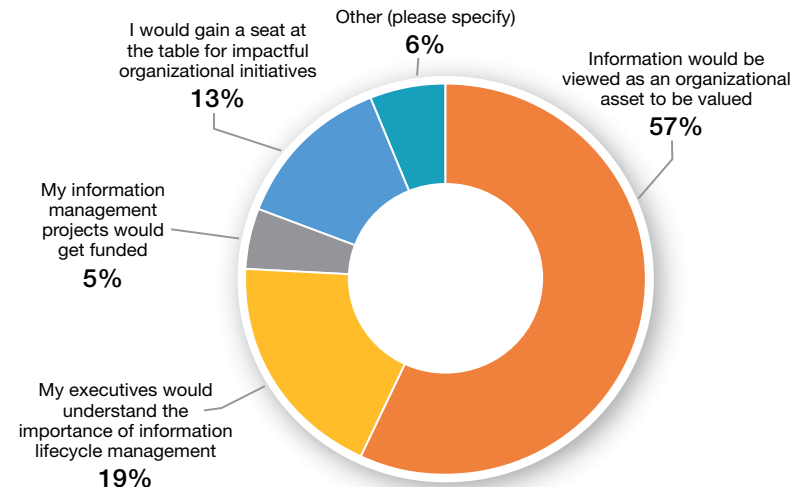
It isn’t enough to deliver the right content to the right people at the right time. Your customers don’t just need content anymore, they need answers. The move to artificial intelligence, chatbots, and conversational user-interfaces is changing how we create and deliver content. [Do you speak robot?](#)

## What do you think is the Most EFFECTIVE strategy for getting stakeholder support? N=265



Thirty-six percent – here again, the highest across all choices – said “making the connection between information management and customer experience.” Right on!

## What would information management success mean to you? N = 265



Fifty-seven percent – the clear majority – said “information would be viewed as an organizational asset to be valued.” A worthy aspiration!

The AIIM CIP Study Guide clearly lays out the case for the importance of aligning information management strategies with business strategies:

*“The focus for information management is broader than simply reducing information-based costs and risks. While this is important, it is insufficient. Rather, organizations need to focus on how to effectively monetize their information assets, directly or indirectly, to move the organization forward. Information management must become a business enabler.”*

Has this increasing general acceptance of the importance of digital transformation and the role of the customer in the journey resulted in alignment of information management/business strategy? The next question seeks to find out ...

**Think about how well your organization aligns BUSINESS strategy with INFORMATION MANAGEMENT/GOVERNANCE strategy. What grade would you give your organization? N= 265**



Sadly, no. Collectively, that's the same C- grade that was reported to AIIM in research performed last year. When asked to explain the reason for their self-assessment grade, respondents said this:

*“There is not any information management strategy aligned with the business strategy.”*

*“Information management is usually just an afterthought.”*

*“Information management strategies are smiled upon at best.”*

*“There is a lack of understanding of Information Management. It is not often considered a key component of the overall picture and is sometimes just thought of as something that gets in the way of doing things.”*

*“Our organizational culture is such that information management doesn't matter and is a waste of time.”*

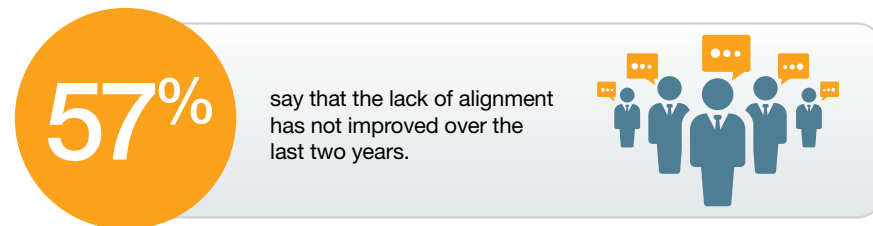
*“Information is not recognized as a critical asset, other than by select individuals.”*

And this comment from an information governance professional is particularly revealing of the divergence of motivation between business executives and information management practitioners:

*“Our overall business strategy is geared more toward product marketing and customer experience. Information management is considered ONLY when it fits that strategy.”*

Why does it remain so difficult to make the BUSINESS case for information management driven by an awareness of the importance of customer experience? To aid in answering this question, we asked a follow up question to see if the past twenty-two months – and new imperatives for supporting a remote/distributed workforce and touchless customer interactions – had provided new levers for the community to demonstrate the value of information management in general and IIM capabilities in particular.

**How has this ranking changed over the last 22 months or so? N = 265**



While these new demands failed to change the average grade across all participants, they did have an effect on those reporting improved alignment. A deeper dive into the two categories of respondents (status quo/worse and improved alignment) reveal two distinctly different strategies and approaches to information management. The next two sections examine those approaches in greater detail.

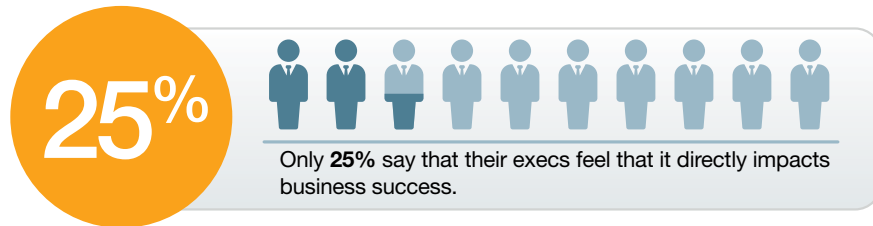
# Finding 2 – An Information Management Program Focused Primarily on Risk/Regulations/Compliance Fails to Move the Needle in the Right Direction



## Finding 2 – An Information Management Program Focused Primarily on Risk/Regulations/ Compliance Fails to Move the Needle in the Right Direction

Overwhelmingly, the low and worsening graders cite a lack of compliance with policy and practice as THE major source of the misalignment and their angst. Let's look more closely at what the low graders said about their current state and level of change:

**What phrase best describes the general attitude that your EXECUTIVES have for your information management practices? N= 265**



### Additional reading from iText:

In the ebook, [PDF/UA: the inclusive document format](#), we will first get to know our audience and the adaptive technology they use. Then we will zoom in on the requirements that make up PDF/UA and how to validate their conformance. We'll also learn about the regulations across the world and how PDF/UA can benefit all users. We'll even take it one step further and provide you a tutorial on creating PDF/UA conformant documents with the iText 7 Suite.

Probing the other 75% elicited these responses. Notice the highlighted words that were used:

*"There is a distinct lack of support and understanding of how information management can reduce **risk**."*

*"My organization adopts **policies** but allows 'opt-out' practices that defeat the purpose of the **policies**."*

*"It takes a lot of reminding and insistence to get colleagues to **comply**."*

*"There are just too many cases of **non-compliance**."*

*"We must be **compliant** end to end."*

And singling out information governance in particular, the negative perception gets worse!

**If you had to describe the perception of INFORMATION GOVERNANCE in your organization, what phrase BEST fits? N=224**





Of the low graders, 30% say that “worker’s eyes glaze over at the mention of the word” and 28% say that “the role of governance and records management is defined only by the retention schedule.” When asked to elaborate, they told us this:

*“We have great **governance** and a robust records department, but scattered alignment of those features across systems.”*

*“Hybrid work life has made it imperative that information is **accounted** for. However not everyone tends to follow this.”*

*“People have become more insistent and demanding that they be **left alone** to create digital workspaces and tools without thought to the vulnerability of that information and data.”*

*“COVID only amplified **poor** IM habits.”*

*“They say that we have their support, but they are extremely reluctant to openly **enforce policies**.”*

*“The last two years didn’t change things as the IT-first approach was always favored. IT resources were put toward collaboration tools versus **risk/records** management solutions.”*

One final point here is that even the rising scope of privacy and security concerns have failed to change the perception that information governance practices lack the ability to influence decisions around data-first and customer-first strategies over the long term. When this group was asked about executive opinion on the motivating drivers behind data privacy efforts, the lower scorers pointed to the risk of noncompliance with new regulations. The higher scoring group said that their executives – known for playing the “negative lottery” – are, in reality, driven by the potential for reputational damage and loss of **customer** loyalty.

If customer experience is overwhelmingly seen as the key Digital Transformation endgame, how does a strategy centered around compliance and records management rules change that? And, with executive attention on growing customers and revenues, is it any wonder that good intentions just aren’t enough? How many of our organizations are still structured around policy or processes that WE impose or that make OUR lives easier? To digitally transform, it doesn’t matter what we want; it matters what our customers want. Said one CIP panelist, “many of the processes that dictate the

creation of a particular record type are driven by regulatory, legal, and business requirements. However, those are not the primary drivers; the business or agency’s core mission is.” The execution of that mission demands access to the right information at the right moment.



#### **Additional reading from ibml:**

How you manage incoming information is crucial. When it doesn’t get to the right place, at the right time, your operational efficiency suffers and so does your decision-making. It’s harder to deliver an optimal experience to customers. And your organization’s information governance may be at risk. The solution? [A digital mailroom.](#)

# Finding 3 – Leveraging Information for Improved Customer (Internal and External) Experience Is the Mantra for those Organizations Reporting Improved Information Management/Business Alignment



## Finding 3 – Leveraging Information for Improved Customer (Internal and External) Experience Is the Mantra for those Organizations Reporting Improved Information Management/ Business Alignment

Alternatively, the approach taken by the 43% of all respondents who reported an increase in the alignment shows that the focus is on business and customer enablement. They cite these reasons for the improvement:

*“**Business** and information management strategies are well-aligned because they simply have to be. This is **our top priority.**”*

*“We have made information management a part of every **business** need within our organization.”*

*“Our **digitalization** strategy was made in **collaboration** with the **business** and it enjoys funding support from our top **executives and board.**”*

*“Information management is now seen to be supporting our **client services** and **growth.**”*

*“COVID actually forced us to make changes and to **think outside the box** to find new ways of doing things. This includes changes to paper processes to facilitate remote work locations and **innovative** ways to meet the **needs of our customers.**”*

*“More **customers** are online now and their real-time **feedback** forces us to make process changes.”*



### Additional reading from Colligo:

Supercharge Your Search Accuracy with Auto-applied Email Metadata, a [free eBook](#) on:

- Why it's critical to ensure email is ingested in your content management platform given knowledge workers spend 40% of their time in Outlook
- The importance of easy, user-friendly, and automated tagging
- The best approach for driving SharePoint user adoption

# Finding 4 – Information Access, Process Automation, and Data Extraction/Analysis Are the Most Effective Customer-centric IIM Capabilities Used to Achieve Information Management/Business Alignment

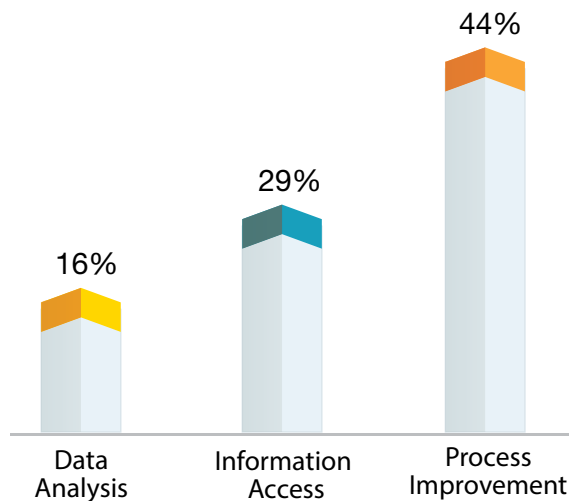


## Finding 4 – Information Access, Process Automation, and Data Extraction/Analysis Are the Most Effective Customer-centric IIM Capabilities Used to Achieve Information Management/Business Alignment

So, how were the higher graders able to successfully achieve alignment, particularly over the last two years? How did they operationalize their information management skills?

In which one of the following areas have you **FOCUSED** your Information Management efforts over the last 22 months?  
N=265

With choices including data privacy and data retention/disposition, the higher graders chose these as their top three:



With additional questions, we probed their specific approaches and mindsets within these three areas.

### Information Access

How well does your organization have a handle on its key sources of information and how they are managed? N=243



*“We convinced leadership to scrap the silos and move toward a **process-based** ECM profile.”*

*“Our work from home situation allowed us to demonstrate the **importance** of knowing where our information is so we can ensure **it gets to those who need it.**”*

*“With our work going more digital, and the deployment of Teams in a thoughtful manner, search and **finding** information has become more important.”*

*“As colleagues depart the organization, they take **tribal knowledge** with them. This has impacted the need for a more centralized approach to information access.”*

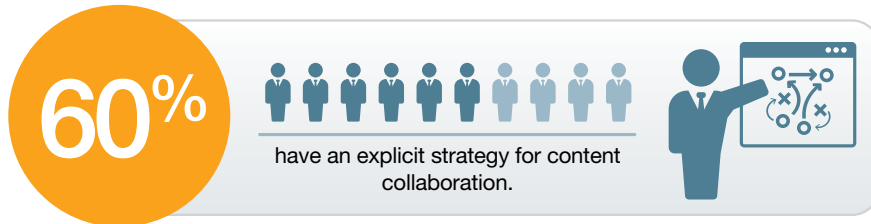


#### Additional reading from Iron Mountain:

By digitizing incoming paper-based mail, organizations can reduce their paper load and bring many of the benefits of electronic mail to today’s “Snail Mail.”

[Learn how 3 organizations leveraged](#) digital mailrooms to reduce their paper-based mail burdens and empower their employees wherever they are.

Do you have an explicit strategy and systems that encourage content collaboration, especially across virtual workforces and organizational boundaries? N= 224

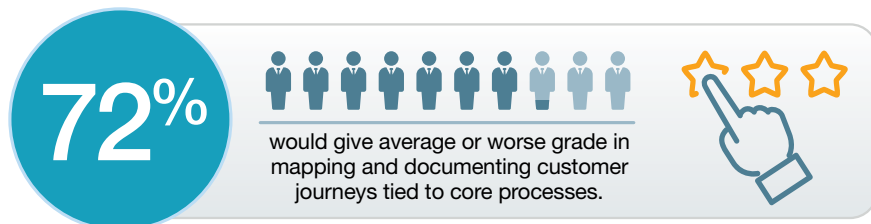


“COVID has created a greater awareness of the need to make information and insights readily available for future **knowledge**.”

“We have a common goal to **enable** information management and **sharing**.”

### Process Improvement

How would you grade your organization’s competency in documenting the major journeys that are core to customer experience and satisfaction, and how these journeys cut across departmental processes? N=225



These responses were received from the low scorers:

“Hardly anyone even realizes that this is a thing, much less a best practice.”

“We only have systems in place to capture and deal with the management of sensitive customer data for **compliance** reasons.”



#### Additional reading from AvePoint:

As the world adjusts to flexible, Cloud-based ways of working, records managers are no exception—information management practices must evolve with today’s digital transformation trends. This [e-book](#) dives into planning for, executing, and managing a migration to a digitally centered M365 records management system. Learn how to navigate common compliance requirements, create retention and disposal schedules, and ensure secure information management.

The remaining 28% are those reporting improved alignment. They cite good practices and progress in achieving this goal:

“Our information management team continues to expand with individuals specifically designated to work **cross-divisionally in a business support role**.”

“The **customer journey** is seen as major driver for **digitization**.”

“I am on the **digital-first** team and we are keenly aware that **customers embrace digital interactions and transactions**.”

“The pandemic and migration to work-from-home (WFH) has dramatically highlighted the **value** of information management, **workflow, and process agility**, the latter being the weakest link previously.”



#### Additional reading from OneSpan:

As digital transformation continues to redefine business, maintaining exceptional customer and employee experiences is a top priority for executives across industries, company sizes and geographies. Easily integrate [OneSpan Sign and SmartIQ to create intelligent, interview style digital forms with e-signatures](#), making it easy for customers to review and sign documents.

High scorers suggest that customer journey mapping within and across departments is a good first step to identifying the gaps that exist in information strategies caused by inconsistent and unconnected information silos. Those showing improved alignment extended their efforts at journey mapping to internal customers, to gauge employee experience with information management processes and systems.

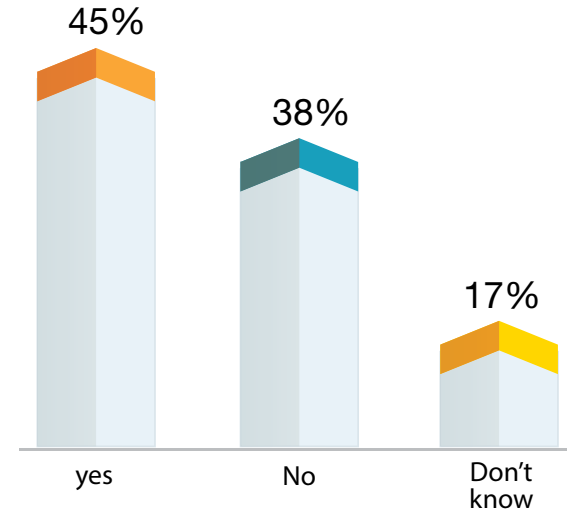
## Data/Information Utilization

### Seven Steps to Customer Journey Mapping

Gartner’s definition of “data literacy”: The ability to read, write, and communicate data in context, including an understanding of data sources and constructs, and the ability to describe the use case, application, and resulting value.

Because that sounds a LOT like the way we at AIIM describe our IIM practice, we asked whether the community makes a distinction between the two and how that is manifested in roles, funding, and organizational alignment.

## Does your organization make a distinction between INFORMATION and DATA – and how each is managed? N= 242



Forty-five percent do make a distinction but an almost equal number do not. For those that do make a distinction, it manifests in different roles, alignment, and funding. These are the explanations provided:

### High Scorers:

*“Data is raw while information is analyzed data with **insights for business.**”*

*“Information is amassed in reports that are **understandable to the users.** Data is just ‘out there’; it may or may not be integrated into the organization.”*

*“Data includes the individual pieces that make up information and that is most often viewed as systems-related and in the hands of technology while information is what the **business user needs.**”*

*“We are looking at info packages in **context**; it does not matter if it’s data or information or both.”*

*“We have definitely improved our alignment with the business through the **increased use of analytics.**”*

*“We’ve been able to make huge strides in the use of our data and **data analytics** to really **tell our story** internally, which in turn drives **program acceptance.**”*



### Additional reading from harmon.ie:

Employment and Social Development Canada (ESDC) distributes approximately C\$120B to Canadians every year. To do this, ESDC employs about 32,000 people all across Canada. According to Alexandre Singh, ESDC Executive Director Business Solutions and Information Management, [the partnership with harmon.ie](#) "enables our employees to do information management without knowing they are doing information management... And that makes all the difference."

## Low Scorers:

The low scoring organizations refer to data as being the **sole purview** of IT and subsequent recipient of funding and executive support. Many also refer to information as synonymous with “records.”

*“Information management does not make a distinction. IT does, and believes they are best equipped to manage data. The distinction they’ve made is **information means records**, anything else is simply data.”*

Similarly, “Information is for **compliance** and data is for enablement.”

*“IT prioritizes data in all areas mentioned and **barely recognizes** information to be the same.”*

*“Information is generally still seen in everyone’s mind as a **paper file folder** at a desk that just needs to be **thrown in a bin** when it piles up.”*

Clearly, this is an important dialogue to continue within the extended AIIM community. It is one that goes beyond the convenient distinction that many in the industry have made between what is meant by structured and unstructured information. If data is what fuels the digital transformation journey, then organizations must commit to becoming data-driven enterprises. Why does that aspiration belong to an isolated team of data scientists and analysts? Rather, information management approaches must encompass a multidisciplinary approach to true data literacy. Only then will the power of big data emerge from the data chaos.



### Additional reading from Papyrus Software:

Overcome digital transformation challenges with intelligent automation:

Gain insights into the new [‘Value Streams Thinking’](#) and how Papyrus connected technologies intelligently capture information and digitize processes to provide one-stop service and response – from request to closure - with all customer inquiry interactions and activities in a single place.

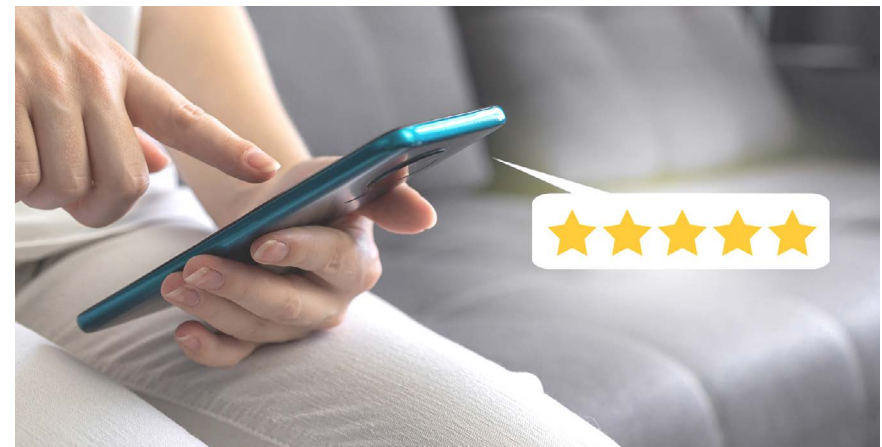
Data is only as strong as its context. By making sense of data, information management professionals can help the business round out its understanding of customers and prospects. By breaking down the organizational information silos, they can create a single customer view based on quality, connected data. In a recent article for CMS WiRE, Tim Kraska, Associate Professor of Electrical Engineering and Computer Science in MIT Computer Science and Artificial Intelligence Laboratory (CSAIL), suggests that data science skills can and should be extended across the organization. One way of accomplishing this is to bring one skill (data science) to departments across the enterprise, rather than expect data scientists to master every other aspect of the business.



### Additional reading from NetDocuments:

How Secure is Your Data in the Cloud?

Organizations across all industries and sectors have a great responsibility to secure information from unauthorized access and carefully protect the data privacy rights of consumers. But not all solutions are equipped to do so. [In this \*\*whitepaper\*\*](#), discover the features and capabilities it takes to be a truly secure collaboration platform in the cloud.





# Conclusion





## Conclusion

The IIM practice and all the disciplines that comprise it have never been more important – but not for the reasons that some in our profession espouse. Despite a universal acknowledgement of the importance of digital transformation and the customer experience aspect thereof, our information management approaches don’t always lend themselves to support the single most important transformation driver. The research shows that mindsets and methodologies centered on risk, compliance, and governance for governance’s sake, only water the seeds of discontent when it comes to business executives and business users. One could say that by speaking the language of doubt, risk, and noncompliance, customer experience is the last thing being improved.

The pandemic has laid bare the significant cost of misunderstanding customer-centric culture and its impact on the changing world of work. This is evident when comparing those organizations that report an improvement in information

management alignment with the business and those that saw no change or a worsening. The former group learned that if information management practices aren’t seen as “moving the product” and “growing the customer base,” they will unlikely change hearts and minds about its importance. Those companies seeing improvement have done so by getting back to a **singular** focus on the customer, both internal and external. And, they did it in incremental ways beginning with the mapping of key customer touchpoints to identify process improvement opportunities. They serve their internal customers by ensuring that the information needed to perform work is accurate and accessible. And, they have become more data literate to help the business extract meaning from myriad data sources. Learning from them, we see how the foundations of IIM can truly be leveraged and optimized to parlay information into new CUSTOMER wins.



### Additional reading from OpenText:

OpenText™ Content Cloud makes modern work possible, empowering distributed workforces with precise information and insight when and where it’s needed. Keep up with the latest best practices, information management trends, and technology advances – including cloud-native technologies, leveraging intelligent automation, and ensuring information governance – in our [content services blog](#).

According to [research](#) firm Forrester, organizations that put the customer at the center of strategy, leadership, and operations grow revenue and profitability more than twice as fast as companies that don’t.

The real opportunity for information management/governance professionals to lead and thrive is unlimited, but only if efforts are channeled to those digital transformation assertions that AIIM and the Leadership Council members made a full five years ago.



While a holistic strategy and approach to information management is ultimately the long-term solution, it's not necessarily effective or realistic right now. Given all the business challenges that organizations are facing, it's too big of a task, with no mandate to sustain it. Perhaps attempting to boil the ocean just buries IM in an even deeper, invisible hole. CIPs suggest that *"most businesses are still focusing on moving product/services to recoup what they have lost due to the pandemic. Information management is only as important as those survival strategies call for."*

Organizations continue to tell us that they face the greatest challenges in dealing with information overload at the intersection of content and processes. They say that simply managing the documents and content necessary for knowledge workers to get their job done is a struggle. This is an ideal opportunity for information management professionals to solve this problem. CIPs share a commitment to enabling business projects through these efforts. Their advice is to avoid looking back. Rather, *"you should begin with where you are now, tackling small but visible projects that can deliver big business results."* Interestingly, all of the panelists attribute their ability to expedite these projects through the use of low-code and no-code applications.

## Where to Start?

To deliver relevant customer experiences, organizations must maximize the value and insights they can derive from their information. This is imperative to an organization's success, as it ensures that allocation of resources is focused on the most relevant and beneficial target audience. By taking an audience-focused approach to information management/governance initiatives, practitioners have the potential to open their organization (and their executives) to new ways to engage the customer, communicate with them, and provide products/services to them. No approach is more effective at closing the information management and business strategy gap.



### **Additional reading from Cadence Solutions:**

Show & Tell – Records Management in M365. [Here's a video recording of Cadence Solution's Live Demonstration to AIIM members](#), showcasing useful out-of-the-box records management functionalities in M365, including audience questions. These are just some features Cadence Solutions can implement for your organization.

They encourage information management professionals to choose an important and impactful information-centric business area or key driver that's unique to their organization. One CIP panelist has recently joined a large American retailer to apply her many years of records management and information governance experience to a single enterprise-level purpose: employee experience. Another panelist has successfully demonstrated how information management practices make her users' jobs and lives easier instead of imposing a lot of processes and policies that impede innovation.

When it comes to their role in minimizing risk and protecting data privacy, CIPs focus on the information assets unique to their businesses and their industries. They ensure that their executives fully understand the risks associated with key information types so that business priorities can be weighted accordingly. *"Our executives must either accept that risk as tolerable or agree that it is no longer tolerable."* Regardless of the degree to which CIP industries are regulated, CIPs find that when it comes to business reputational damage, most executives are not willing to accept that risk. *"You can't separate privacy from the customer,"* said one panelist. *"Respect for the Individual."* For these CIPs, that isn't just a saying. It's truly something that their organizations consider in every discussion and every effort. *"We are building strategies and policies to go above and beyond privacy to truly be good stewards of our customers' data, working with them to put ethics at the top of everything we do together."*

These CIPs understand that people-centered culture plays a powerful role in propelling growth, attracting and retaining the best staff, and advancing organizational mission. They invite you to change your vocabulary. Instead of words like *"governance"* or *"compliance,"* use *"process automation,"* *"workplace effectiveness,"* and *"customer journeys"* to describe your area of expertise. Become THE authority on one or more of those business activities. Quite simply, when you solve internal and external customer issues, you create for yourself an indispensable role in moving the organization to those higher-order goals.

Finally, leverage and refine the other elements of IIM for intelligent capture/extraction and knowledge sharing. *"We focus our efforts on data and insights in order to provide the most relevant goods and services. Being able to bring data and information together is key to overcoming a siloed approach to the customer. When these groups work together to build a customer-focused solution, everyone wins."*



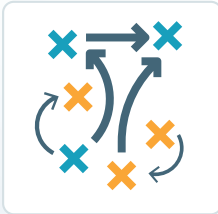
# It (Still) All Comes Down to the Customer. 9 Key Data Points for Information Managers

The most **IMPORTANT** ingredient in your digital transformation strategy

1



enriching customer experience in all aspects of the business



The most **EFFECTIVE** strategy for getting stakeholder support

2

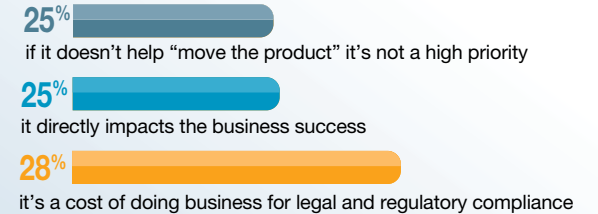


making the connection between information management and customer experience



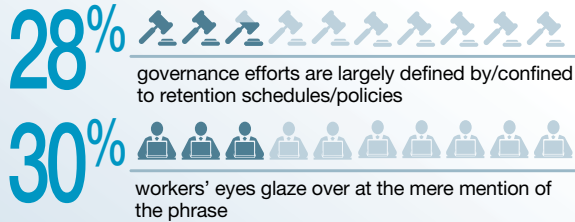
Executive attitudes toward information management practices

3



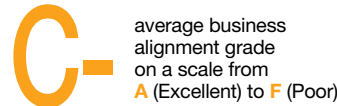
Perception of Information Governance is largely negative

4



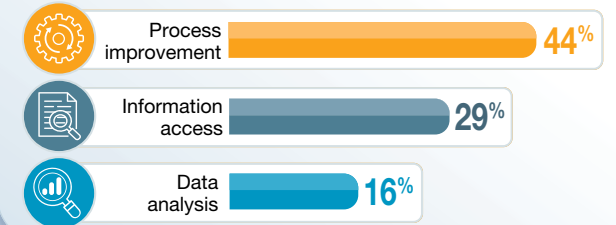
Organizations are failing to align information management strategy with business strategy

5



Higher alignment scorers focus their information management efforts in three areas

6



Higher alignment scorers encourage content collaboration across virtual workforces and organizational boundaries

7



have an explicit strategy and systems to support this



Customer journey-mapping competency is low

8

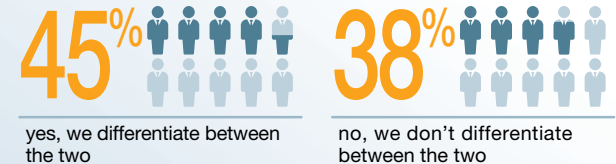


would grade their organization as average or worse in documenting customer experience across key processes



Lines between "information" and "data" management blur

9



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Learn more at [www.avepoint.com](http://www.avepoint.com)



### Cadence Solutions

Cadence Solutions is a private Systems Integrator with years of experience specializing in Enterprise Content Management (ECM) in partnership with Microsoft, OpenText, and SAP. Cadence provides clients access to a broad range of technical services, superior implementation methodologies, and managed services. Their strength and reputation in the information management space has grown over the years, Cadence Solutions has not only adapted to the rapid innovation occurring in the industry but have also distinguished themselves as a leader and valued partner.

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Learn more at [www.harmonie.ie](http://www.harmonie.ie)

## Developed in Partnership with:

The logo for ibml, featuring the lowercase letters 'ibml' in a bold, black, sans-serif font. A small green dot is positioned above the letter 'i'.A dark grey horizontal banner with a yellow arrow pointing to the right. The text 'ibml' is written in white on the left side of the banner.

ibml

ibml is the world-class market leader in high-volume, mission-critical intelligent document processing capture solutions. Through the power of speed, intelligence and unsurpassed experience, ibml helps organizations extract valuable information from large volumes of complex documents and accelerate it for immediate use in business applications.

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Learn more at [www.ibml.com](http://www.ibml.com)

The logo for Iron Mountain, featuring a stylized blue mountain range icon to the left of the text 'IRON MOUNTAIN®' in a bold, black, sans-serif font.A dark grey horizontal banner with a yellow arrow pointing to the right. The text 'Iron Mountain' is written in white on the left side of the banner.

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Iron Mountain Incorporated (NYSE: IRM), founded in 1951, is the global leader for storage and information management services. Trusted by more than 225,000 organizations around the world, and with a real estate network of more than 85 million square feet across more than 1,400 facilities in over 50 countries, Iron Mountain stores and protects billions of valued assets, including critical business information, highly sensitive data, and cultural and historical artifacts.

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### Microsoft

Microsoft enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.

Learn more at [www.microsoft.com](http://www.microsoft.com)

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OneSpan helps protect the world from digital fraud by establishing trust in people's identities, the devices they use, and the transactions they execute. OneSpan's solutions significantly reduce digital transaction fraud and enable regulatory compliance for more than half of the top 100 global banks and thousands of organizations around the world.

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OpenText™ Content Cloud builds on 30 years of pioneering innovation to offer a fully integrated suite of content services solutions, from capture to lifecycle management to archiving. OpenText Content Services technology is playing a lead role as organizations rethink their approach to content management and enhance:

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Learn more about OpenText Content Cloud at [www.opentext.com](http://www.opentext.com)

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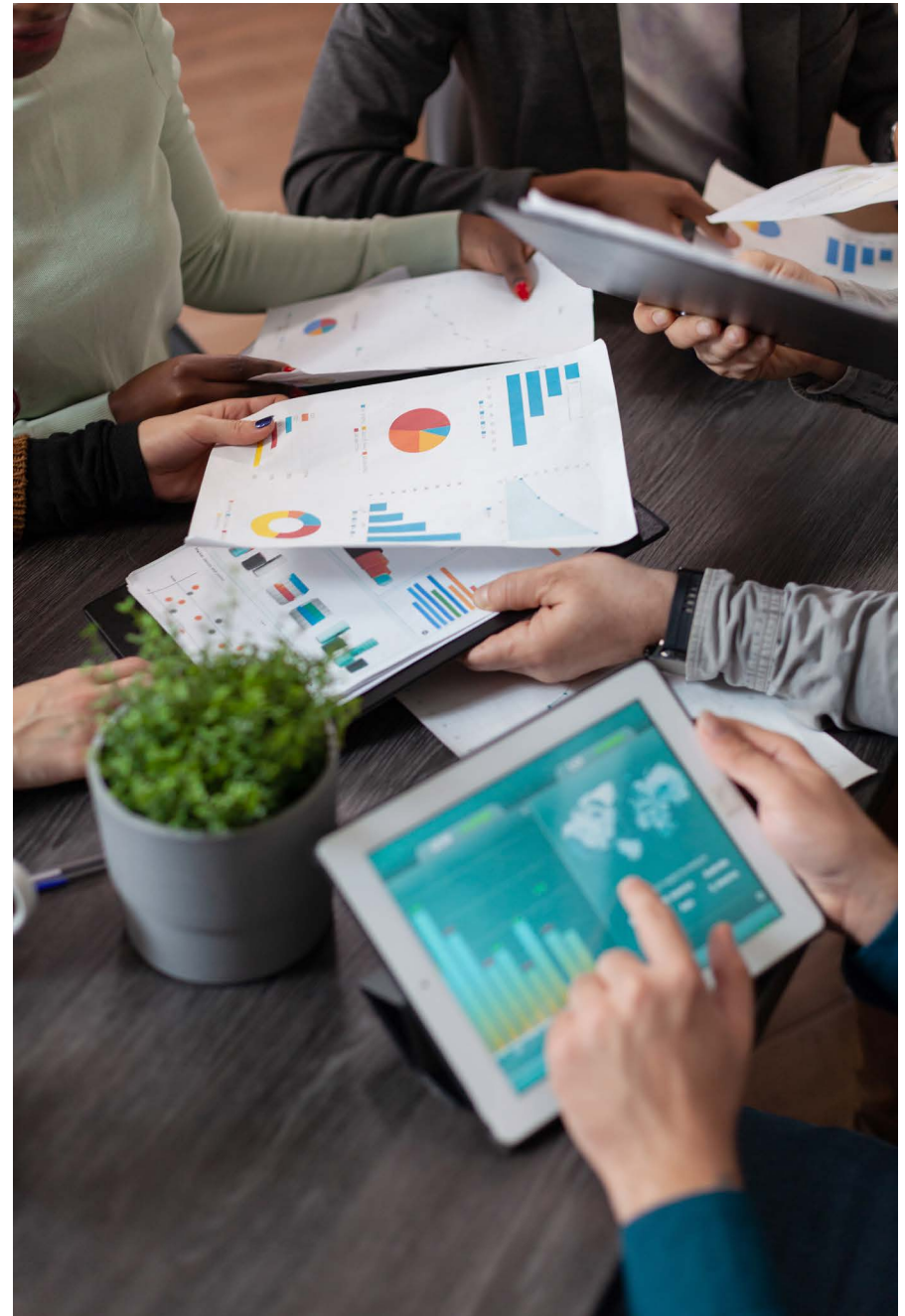
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# 2022 Belongs to the Information Stewards

**As you read in this report, Information Management will look very different in 2022!  
In many ways, that's a relief, but it also means new challenges to overcome, like:**

- Supporting remote-based and work flexibility
- Aligning business and technology strategies
- Creating a framework for information value

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## About AIIM

Here at AIIM, we believe that information is your most important asset and we want to teach you the skills to manage it. We've felt this way since 1943, back when this community was founded.

Sure, the technology has come a long way since then and the variety of information we're managing has changed a lot, but one tenet has remained constant — we've always focused on the intersection of people, processes, and information. We help organizations put information to work.

AIIM is a non-profit organization that provides independent research, training, and certification for information professionals.

Visit us at [www.aiim.org](http://www.aiim.org).

**Written by the AIIM education  
and content team.**

*Contributions by:*

**Peggy Winton, CIP**

*President of AIIM*

