

Transforming Processes And Experiences With Content, Automation, And AI

Insights From The Fifth Annual Content Services Pulse Study,
2024 Edition

A FORRESTER CONSULTING THOUGHT LEADERSHIP PAPER COMMISSIONED BY HYLAND, FEBRUARY 2024

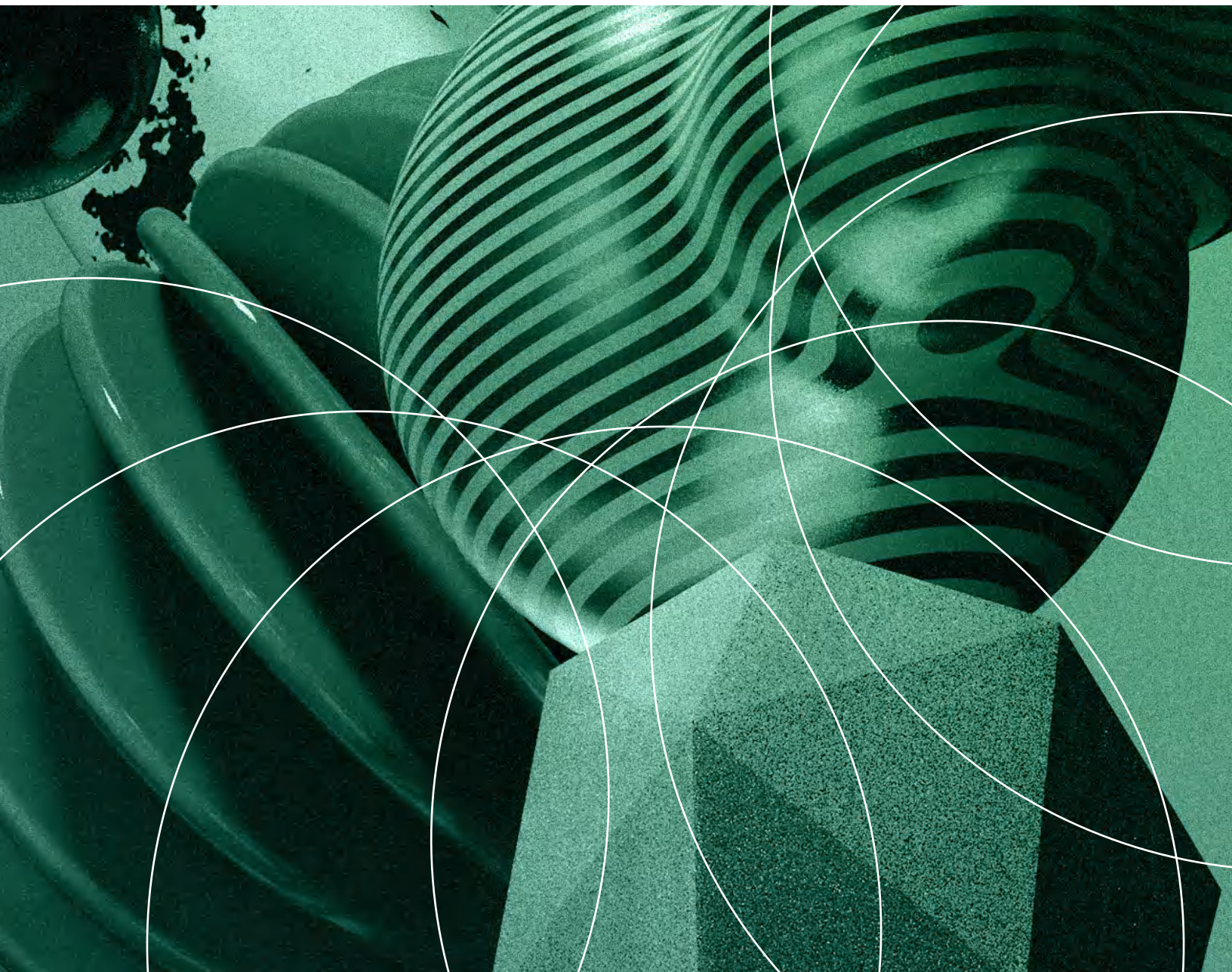


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Executive Summary

Success in managing enterprise content is no longer just about driving incremental improvements to back-end processes. Today, leaders are creating an environment where internal and external stakeholders can access and interact with content seamlessly, leading to greater productivity and superior customer and employee experiences. Yet balancing accessibility, usability, relevance, collaboration, security, and performance needs is difficult, particularly as the volume and diversity of content continues to grow. Decision-makers are turning to automation and artificial intelligence (AI) to augment their ability to retrieve, transform, summarize, and analyze content used in common processes. However, few have been able to realize the true potential of these technologies to date.

In August 2023, Hyland commissioned Forrester Consulting to launch the fifth study in a research series that has tracked the evolution of traditional enterprise content management (ECM) to modern content services since 2018. This year's study included an exploration of automation and AI's role in enhancing content-related experiences and productivity. To evaluate this topic, Forrester conducted an online survey with 405 global content management decision-makers representing a variety of roles and industries. We found that a modern approach powered by a content services platform is essential to successfully navigating the disruption and opportunity automation and AI present.

Key Findings



Complexity is stifling content management improvement.

Content processes must be digitized, secure, and streamlined to meet common business priorities. But organizations' large volume of content and sprawling set of tools have made integration and information hygiene a struggle. Manual workarounds remain necessary, leading to time wasted looking for critical inputs and validating the accuracy and suitability of information surfaced, degrading the very experiences decision-makers want to improve.



Automation and AI can improve content goals, but work

remains to drive results. Content leaders have been experimenting with automation and AI for years, yet interest in these technologies has reached new heights. Eighty-one percent believe that AI-enabled automation will meaningfully improve content-heavy processes over the next two to three years. Due to a lack of expertise as well as security and privacy concerns exacerbated by governance challenges, just 30% are taking advantage of AI-enabled automation today.



Leading companies are finding success with a modern

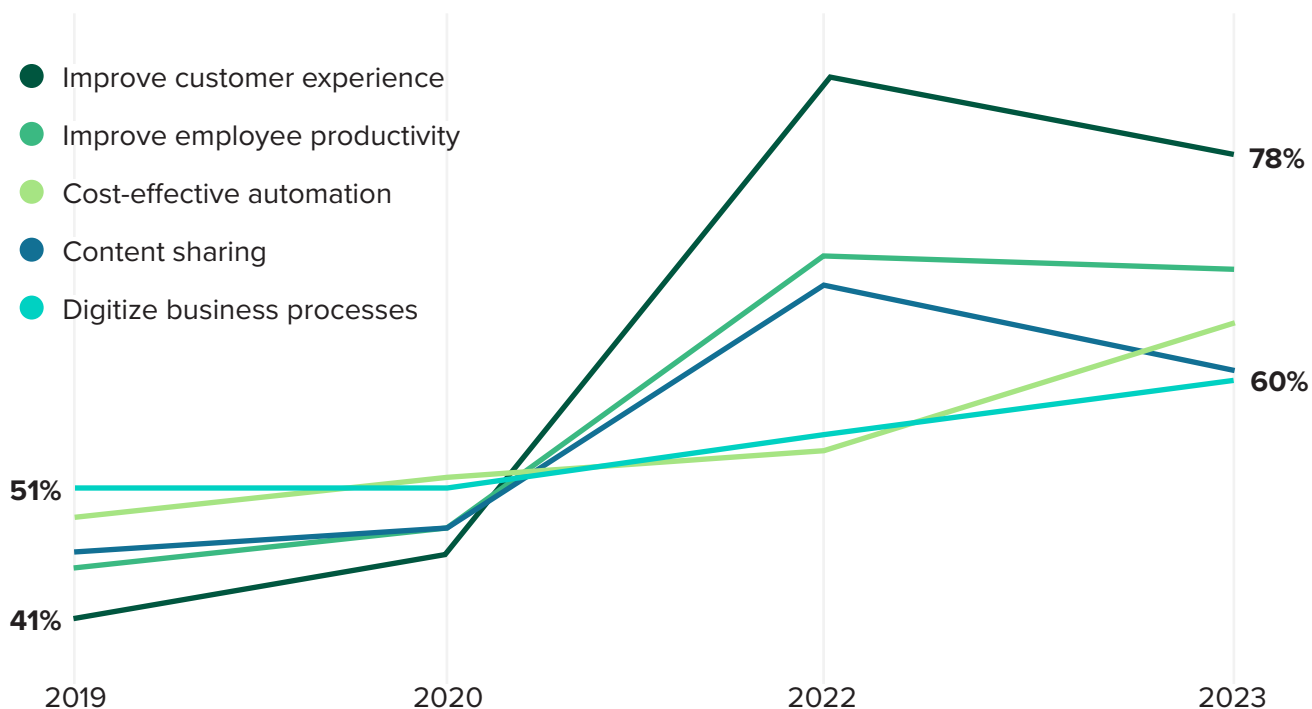
platform. Decision-makers can learn from a segment of companies called Shift Leaders who are making investments with modernization, improved experiences, and innovation in mind. This includes adopting a content services platform that can unify hybrid technology landscapes and provide enterprise-ready capabilities to leverage automation and AI effectively and securely.

Automation And AI Are Revolutionizing Content Processes And Experiences

Content in the form of documents, internal communications, video, and other knowledge artifacts are essential to today’s digital workplaces. To derive the most value from these assets, organizations must continuously improve their ability to harness them across essential enterprise applications, collaboration tools, end-user computing services, and employee-facing apps.¹ More and more, success in this endeavor means experience improvements for internal and external stakeholders in the course of creating, sharing, using, and managing content (see Figure 1).² To make this possible, decision-makers are razor-focused on digitizing business processes, enabling secure content sharing, and streamlining work.

FIGURE 1

“What are the primary objectives driving your organization’s content management strategy?”



Base: Variable global enterprise content management decision-makers; see endnote 2 for details
 Note: Showing top responses
 Source: A commissioned study conducted by Forrester Consulting on behalf of Hyland, December 2019, December 2020, November 2022, October 2023

TECHNOLOGY AND INFORMATION SPRAWL HAMPER CONTENT MANAGEMENT AMBITIONS

Decision-makers report several obstacles standing in the way of their content management objectives. A proliferation of tools is a top challenge: 47% report managing too many content-related technologies and/or partners. Making matters worse, 48% struggle to integrate these tools. Meanwhile, the rate of content growth is outstripping decision-makers' governance capacity. As a result, 42% have large amounts of critical content hiding in information silos across their enterprise.

Over time, content silos result in inconsistent governance and fragmented search experiences.³ Left unaddressed, these issues make an organization vulnerable to:

- **Security and privacy risk.** Knowledge workers need access to information they can trust, yet 45% of decision-makers describe their organization's content and data hygiene as inadequate. Redundant, obsolete, or trivial data leads to cluttered search results and confusion. Any uncertainty over which content holds sensitive customer or employee data exposes an organization to financial and reputational damage, especially if personally identifiable or other confidential information is breached or inadvertently leaked.⁴
- **Poor employee experiences (EX).** Information workers who are highly engaged in their work express satisfaction with their ability to access the information they need to do their jobs and use technology to collaborate with their peers.⁵ One study put the profitability benefit at 23% higher for organizations in the top quartile of employee engagement. The study also showed 81% lower absenteeism, 10% higher customer loyalty, 41% higher quality (i.e., fewer defects), and between 18% and 43% lower employee turnover depending on the industry and role.⁶ Sixty-nine percent of decision-makers agree that making it easy for employees to surface the content they need for work is critical to their EX. Unfortunately, 40% of them say their workers spend too much time looking for needed information — a 21% increase since 2019.

ENTERPRISE CONTENT MANAGEMENT STRATEGIES ARE EVOLVING IN TANDEM WITH AUTOMATION AND AI ADVANCEMENTS

Given their need to manage growing volumes of diverse content assets across their lifecycle without compromising on security or experiences, it’s not surprising that over 60% of surveyed leaders view automation and AI as having a large or significant impact on their organization’s ability to meet their objectives. From content extraction, categorization, transformation, and generation to governance and process improvement, respondents describe wanting to use these technologies across a variety of horizontal and vertical use cases to drive transformation and impact.

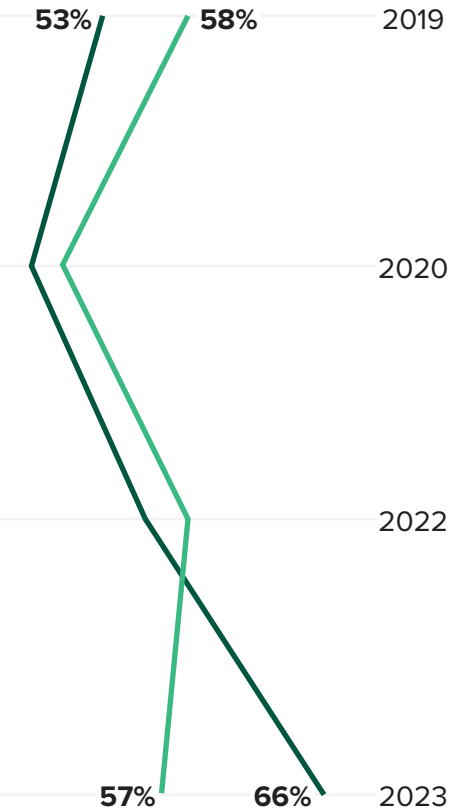
These technologies are not new to content management leaders. Just over half of respondents through the years have reported that their company was meaningfully evolving its approach to content to account for automation trends (see Figure 2).⁷ Examples include using tools like robotic process automation (RPA) to automate rote, repetitive tasks with a high degree of dependability and scalability. AI has long held enormous potential for enterprise content management, including for predicting, classifying, and enriching content, therefore better enabling automation and decision-making. Today, advancements in enterprise AI have led 66% to “completely” or “significantly” evolve their approach to content — a meaningful increase over the last few years.

FIGURE 2

“To what extent have the following trends led your organization to evolve its content management approach?”

(Showing “We have significantly evolved our approach because of this trend” and “We have completely evolved our approach because of this trend”)

- Artificial intelligence
- Automation



Base: Variable global enterprise content management decision-makers; see endnote 7 for details
 Source: A commissioned study conducted by Forrester Consulting on behalf of Hyland, December 2019, December 2020, November 2022, October 2023

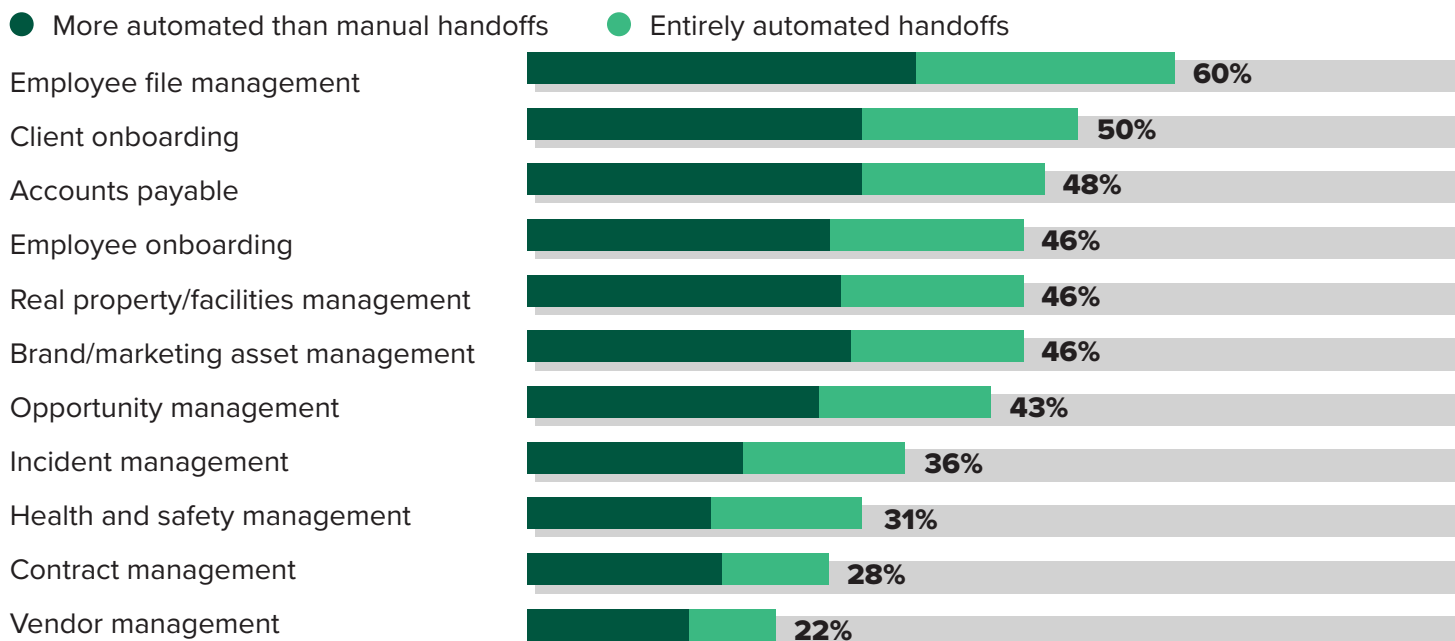
Few Are Prepared To Harness The Full Potential Of AI-Enabled Automation

While enterprise content leaders see the value of automation and AI, many are still developing their ability to unlock the value of these technologies within content-centric tasks and processes. Decision-makers rate their organizations as being somewhat further into their automation journeys, with 50% describing their capabilities as advanced; just 29% say the same for AI.

Yet a deeper look reveals that even with automation, many decision-makers are overestimating their organizations' maturity. Just 56% have automated most routine tasks related to creating documents. And when it comes to more advanced capabilities like automating the exchange of information between individuals or systems in end-to-end processes, there's ample room for improvement (see Figure 3). Manual dependencies involving paper, email,

FIGURE 3

“What degree of automation does your organization have in place to execute the exchange of content/information between individuals/systems in these processes?”



Base: 405 global enterprise content management decision-makers

Source: A commissioned study conducted by Forrester Consulting on behalf of Hyland, October 2023

phone, and/or mail persist. For example, even though it encourages siloed conversations, more than half of knowledge workers cite email as the primary vehicle they use to share information with internal or external stakeholders.⁸ In many cases, less than half of respondents come from organizations where the exchange of content for common processes like accounts payable or employee onboarding is mostly automated; fewer than one-third in the case of health and safety, contract, or vendor management processes.

DECISION-MAKERS ARE LAYING THE GROUNDWORK FOR PROCESS IMPROVEMENTS VIA AI-ENABLED AUTOMATION

Decision-makers are taking action to improve content-heavy workflows. A key step for most (57%) is investing in digital process automation (DPA), which enables a high degree of coordination across systems and applications. AI has the potential to add even more value to these efforts, particularly when used with automation technologies to enable systems to take over routine administrative tasks and, increasingly, some knowledge work.

Today, just 30% of respondents are augmenting their organization's automation efforts with AI. However, study data suggests this will soon change. Eighty-one percent predict that AI-enabled automation will meaningfully improve content-heavy processes over the next two to three years, leading to greater operational efficiencies and improved experiences for customers and employees (see Figure 4). Meanwhile, decision-makers have their sights set on several AI-enabled use cases, with over 50% focused on leveraging content and image generation, automated tagging/categorization, and intelligent search within the next one to two years (see Figure 5).

Intelligent content automation leverages AI and other advanced capabilities to autonomize content-centric processes, boost efficiency, and unlock valuable insights for informed decision-making and improved business outcomes.

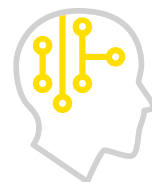
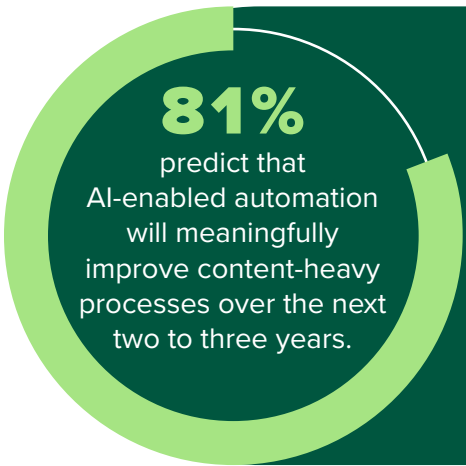
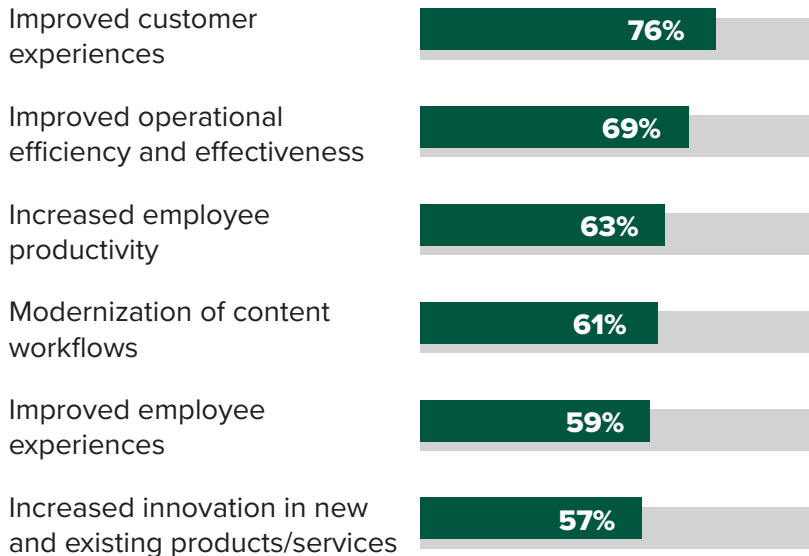


FIGURE 4

“What benefits have you realized, or do you expect to realize, from augmenting content-centric tasks and processes through intelligent automation?”

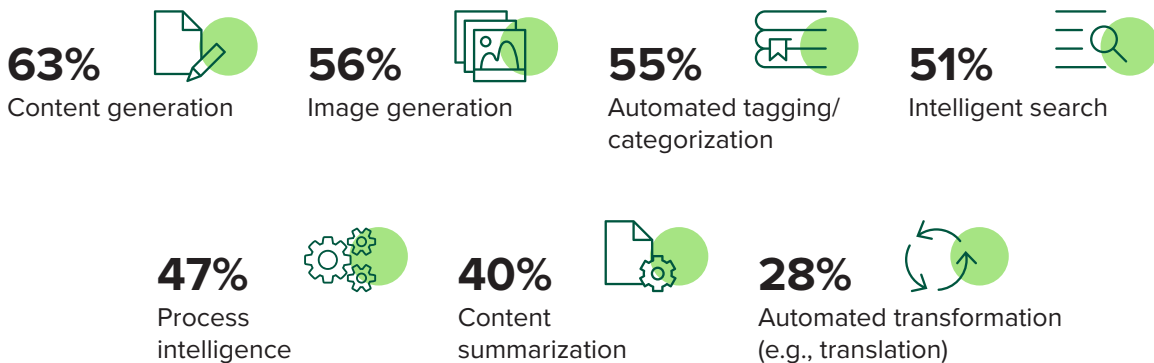


Base: 405 global enterprise content management decision-makers
Note: Showing top benefits
Source: A commissioned study conducted by Forrester Consulting on behalf of Hyland, October 2023

FIGURE 5

AI-Enabled Automation Makes It Easier To Retrieve, Analyze, Transform, And Summarize Enterprise Content

(Showing “Near-term focus” or “Medium-term focus”)



Base: 405 global enterprise content management decision-makers
Source: A commissioned study conducted by Forrester Consulting on behalf of Hyland, October 2023

A LACK OF GOVERNANCE AND EXPERTISE IS IMPEDING INTELLIGENT AUTOMATION ADOPTION

Regardless of organizational readiness, AI's impact on enterprise content is already being felt. AI-generated content and the prompts used to create it are among the many content artifacts — along with digital conversations, video and audio files, and visual collaboration outputs — that have grown in volume over the last year. Forty-nine percent of respondents report a moderate to significant increase in the AI-generated content their organization has either created or ingested from external stakeholders.

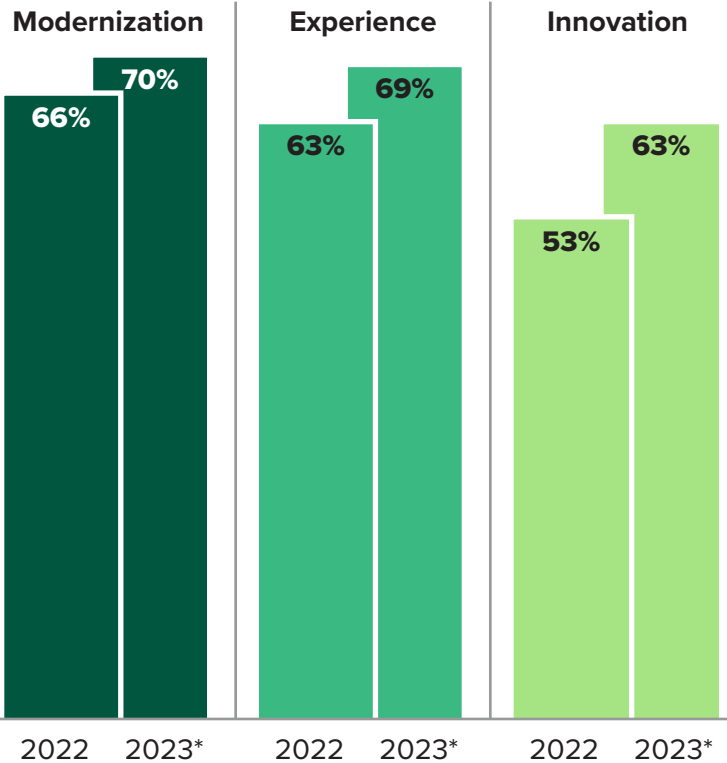
The concern, however, is that formal governance is lacking. Just 40% are managing AI-generated content at least partly. Governance issues, particularly with respect to AI, create security and privacy vulnerabilities. Security and privacy concerns are a primary obstacle (51%) — alongside a lack of expertise (52%) — holding leaders back from taking full advantage of intelligent automation.

A Modern Content Platform And Approach Is A Gateway To AI-Enabled Work

Deploying more point solutions and mimicking manual processes digitally will not produce better results. To control the sprawl of information, improve content curation, and boost productivity, content management leaders must revisit their approach through a modernization, experience, and innovation lens. Signaling the value they see in these imperatives, decision-makers are even more likely to invest in these areas (see Figure 6).

FIGURE 6
Investment In Three Imperatives Underpin Enterprise Content Management Success

(Showing percent investing “moderately” or significantly” in each imperative)



Modernization
Moving from legacy tools to modern solutions/platform to reduce risk, eliminate silos, and improve IT agility in supporting the organization to meet evolving business needs

Experience
Investing in integration, intelligent automation, and app-like UIs to improve the ease and effectiveness of employee and customer experiences, including improved user engagement and productivity

Innovation
Supporting a culture of innovation by equipping employees with tools that make it easy to design, develop, and/or collaborate on content-based processes or apps, better enabling them to deliver greater customer value

Base: 219 global enterprise content management decision-makers
 *Base: 189 global enterprise content management decision-makers
 Source: A commissioned study conducted by Forrester Consulting on behalf of Hyland, November 2022, October 2023

LEADING COMPANIES HAVE MADE THE SHIFT FROM TACTICAL TO STRATEGIC CONTENT MANAGEMENT

A segment of respondents come from companies that are ahead of the curve in their embrace of modernization, experience, and innovation imperatives, investing in each at an above-average rate and adopting a content services platform (see Figure 7). These companies are Shift Leaders.

Shift Leaders illustrate the value of having a modern platform and approach. Relative to Shift Laggards, Shift Leaders have been able to mitigate several pain points that can put a drag on productivity, especially those related to information silos, inadequate content hygiene, and difficulty with legacy systems. They're also more likely to exceed their employees' experience expectations (62% vs. 47%) and describe their digital transformations as "Very successful" or "Completely successful" (68% vs. 55%). To make this possible, Shift Leaders are focused on a range of best practices, including:

- **Modernization.** Technology buyers are moving away from older architectures designed for on-premises deployment in favor of cloud, which is easier to maintain, configure, and integrate.⁹ Sixty-six percent of Shift Leaders are proactively migrating users and content off legacy systems and repositories, and 80% describe their content management strategy as cloud-first. The greatest benefits of adopting software as a service (SaaS) relate to business agility, resilience, and innovation.¹⁰ Unburdened by the complexities of infrastructure management and procurement, SaaS users are better positioned to drive innovation and respond to the needs of their business.
- **Experience.** Content technologies designed to function best when employees are in the office will no longer meet the needs of the hybrid-work era.¹¹ Shift Leaders understand this evolution. Seventy-three

FIGURE 7

Shift Laggards Vs. Shift Leaders

Shift Laggards

Have not yet adopted content services and make average or below-average investments in modernization, experience, and/or innovation to support their enterprise content management strategy

Shift Leaders

Have adopted content services and make above-average investments in modernization, experience, and innovation to support their enterprise content management strategy

percent have invested in cloud-based apps that simplify working remotely and from a variety of devices, as well as apps/interfaces that support a seamless user experience.

- **Innovation.** Shift Leaders are taking steps to create an environment where innovation can thrive by unburdening employees from low-value, repetitive, or manual activities. Sixty-seven percent are developing their intelligent automation capabilities to automate manual processes and extract deeper insights from data. Repeatable workflows and document templates designed for industry-specific needs are also valuable for speeding time to innovation. Seventy-four percent of Shift Leaders are investing in capabilities like these that are tailored to their organization's industry's unique needs.

SHIFT LEADERS BUILD THEIR STRATEGIES ON A FOUNDATION OF CONTENT SERVICES

Shift Leaders' efforts are supported by a modern content services platform. These platforms have configuration, design, and development tools allowing for the creation of document- or process-rich content applications. They provide access to in-demand and enterprise-ready AI-enabled features, and offer rich search, navigation, and secure collaboration and file-sharing capabilities that are important to EX and governance goals.

One of the most powerful features of a content services platform is its ability to unify a complex technology landscape. While SaaS delivery models dominate new deployments, on-premises deployments persist in many organizations, particularly when they're deeply integrated with other essential enterprise applications.¹² Increasingly, decision-makers need to architect a hybrid environment (see Figure 8).¹³ Content services can support SaaS, hosted, on-premises, or any combination of these deployments.

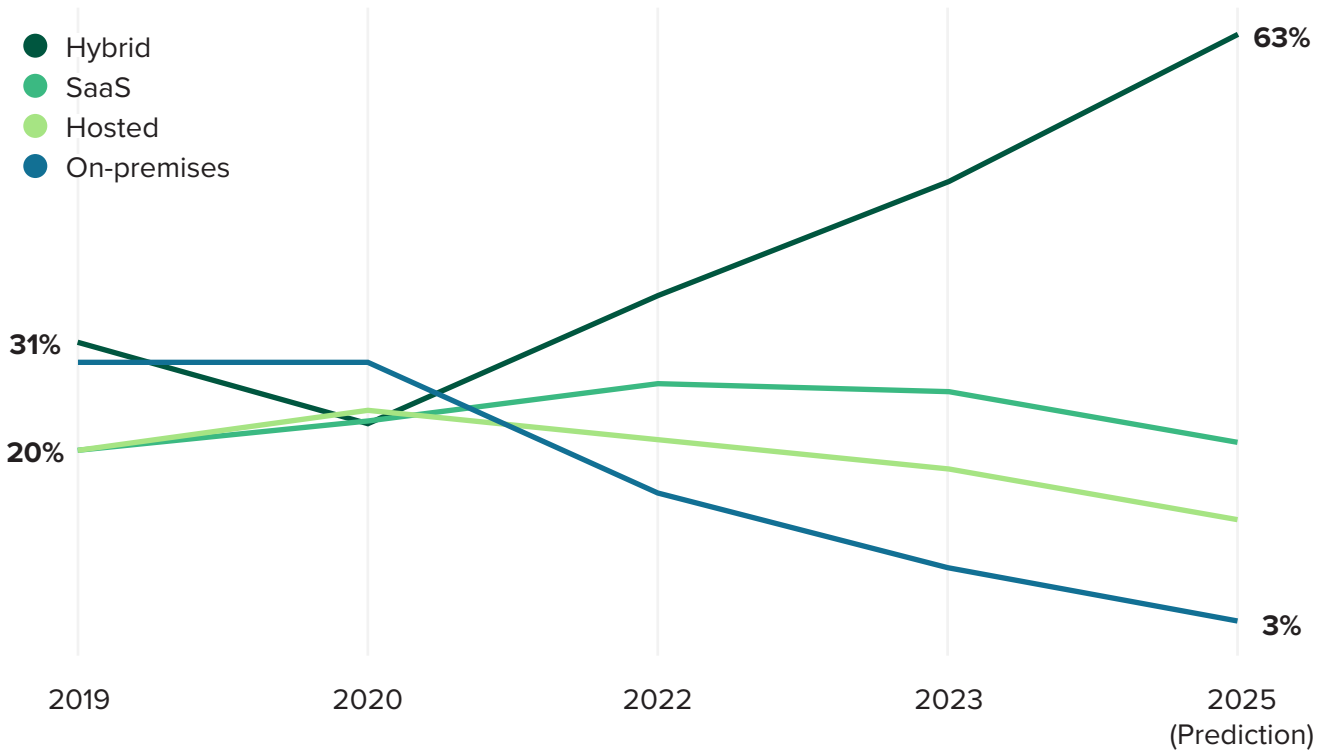
The proportion of respondents citing challenges with architecting a hybrid environment has grown by

**30% since
2019.**



FIGURE 8

Primary Deployment Method For Enterprise Content Management Solutions



Base: Variable global enterprise content management decision-makers; see endnote 13 for details
Note: 2025 prediction given by 2023 respondents
Source: A commissioned study conducted by Forrester Consulting on behalf of Hyland, December 2019, December 2020, November 2022, October 2023

Modern platforms deliver measurable business value that includes automating and digitizing routine tasks, improving EX, and meeting legal or regulatory requirements that may dictate information-handling practices.¹⁴ Decision-makers in our research have long associated several benefits with a modern content services platform, and many of these associations have grown stronger over time. This is especially true for content services' ability to drive digital transformation, customer experience, collaboration, and process efficiency improvements — the percent who cite these as benefits their organization has already realized or expects to realize has grown by more than 20% over the last four years.

60%
are making content services a top priority of their organization's digital strategy.

DECISION-MAKERS SEEK PLATFORMS THAT SUPPORT INTELLIGENT AUTOMATION GOALS AND TOP USE CASES

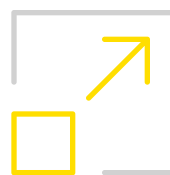
As they evaluate content management technologies for their organizations, decision-makers can learn from Shift Leaders by ensuring solutions address their organizations' modernization, experience, and innovation goals. Content management leaders are giving preference to solutions with modern capabilities that make it easier to:

- Integrate existing business applications (73%), reducing frequent context-switching and enabling better focus on core tasks.
- Collaborate with internal and external stakeholders (68%), better connecting today's extended enterprises.
- Search for needed documents/information (56%), reducing time wasted looking for critical inputs.
- Use AI-enabled capabilities (55%), helping to augment automation and provide more intuitive user experiences.

As interest in intelligent automation grows, so too has the importance leaders are placing on enabling capabilities that modern platforms typically support, including data extraction and capture, AI/machine learning (ML), RPA, and metadata or tagging.¹⁵ Data extraction and capture is the top feature in a modern platform. Intelligent document extraction or processing involves identifying data and key concepts for use in downstream apps or to improve search.¹⁶ In the case of accounts payable, for example, a modern platform would use pretrained models to allow nondeveloper, nondata-scientist roles to automatically categorize documents and extract data from common record types, such as invoices, statements, or forms, using small sample sets of training documents and an intuitive user interface.¹⁷

87%

describe data extraction and capture as an important capability in a modern platform.



Key Recommendations

Technology and business decision-makers continue to put modern content management platforms and approaches high on their priority list as they execute their digital strategies and transform business processes. Companies that show leadership in accelerating automation are also showing strong interest in adopting AI to get to the next level of productivity gains and experience improvements.

Forrester's in-depth survey of 405 global decision-makers about the evolution of their organization's content management strategies yielded several important recommendations:

Continue to identify and address modernization opportunities.

Transformation is a journey — not a destination. As technology innovation continues in the content services market and decision-makers increase their confidence in automation and AI-readiness, watch for new opportunities and adopt a continuous improvement mindset. Map a customer or employee journey to identify barriers and pain points. Analyze current bottlenecks, tasks that are duplicated, and other areas that business leaders find inefficient.

Put customer and employee experiences at the forefront when prioritizing automation opportunities.

Use a customer experience (CX) and EX lens when looking at automation opportunities. Explore where AI can automate data extraction, categorize content, and assist with content generation to create, summarize, or deliver information to relevant audiences. Improving access to content, digitizing manual processes, and bringing relevant data together from multiple sources can make it easier to serve client needs, answer questions, or enable self-service. Similarly, eliminating tedious routine tasks, such as content or data formatting or approval processes, makes life easier for employees, allowing them to apply their skills to higher-value work.

Explore technologies to enrich content and make it AI-ready.

A shortage of content is rarely the problem — but a shortage of trustworthy, findable content in formats that are easy to search for and use in related applications can be. Information sprawl can also inhibit automation. Evaluate tools that can extract useful data and contextual information out of static document types and enrich them with metadata as part of an AI preparedness journey.

Ensure governance keeps pace with AI innovation.

AI adoption, including emerging areas such as generative AI (genAI), will enable new approaches to content creation, revision, and automation. Don't let security, privacy, retention, or disposal policies lag behind new sources of information. Ensure permission controls are in place, and policies for when and where to use different genAI apps are communicated to employees.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 405 enterprise content management decision-makers from insurance, manufacturing, government, financial services, business/professional services, healthcare, higher education, and retail organizations in the US, the UK, France, Germany, and Australia. Survey participants included decision-makers in IT and non-IT roles with responsibility for or influence over their organizations' content management strategies. Questions provided to the participants asked about their organization's content management objectives, the extent to which automation and AI are helping to advance their organization's goals, obstacles in their organization's ability to respond to the opportunity and risk these technologies present, and the role a modern platform and approach can play in advancing their organization's efforts. Respondents were offered a small incentive as a thank-you for time spent on the survey. The survey fielding began and was completed in October 2023. In cases where responses are compared to those given in studies from prior years, the respondent profile was adjusted to match for continuity purposes.

Appendix B: Demographics

COUNTRY	
United States	43%
United Kingdom	19%
Germany	13%
Australia	13%
France	12%

SIZE	
500 to 999 employees	13%
1,000 to 4,999 employees	45%
5,000 to 19,999 employees	28%
20,000 or more employees	14%

DEPARTMENT	
IT	62%
Human resources/employee experience	10%
Operations	9%
Line of business	9%
Research and development	5%
Customer experience	5%

SENIORITY	
C-level executive	15%
Vice president	22%
Director	33%
Manager	31%

INDUSTRY	
Insurance	13%
Financial services	13%
Healthcare	13%
Manufacturing	13%
Business or professional services	13%
Retail	12%
Higher education	12%
Government	12%

Note: Percentages may not total 100 due to rounding.

Appendix C: Endnotes

- ¹ Source: “[The Five Key Trends That Will Shape Your 2022 To 2023 Content Services Strategy](#),” Forrester Research, Inc., September 8, 2022.
- ² Showing 351 decision-makers in 2019, 257 in 2020, 219 in 2022, and 189 in 2023.
- ³ Source: “[The Five Key Trends That Will Shape Your 2022 To 2023 Content Services Strategy](#),” Forrester Research, Inc., September 8, 2022.
- ⁴ Ibid.
- ⁵ Source: “[The Content Platforms Landscape, Q4 2022](#),” Forrester Research, Inc., November 21, 2022.
- ⁶ Source: “[Blueprinting An Employee-Centered EX Initiative](#),” Forrester Research, Inc., February 28, 2023.
- ⁷ Showing 351 decision-makers in 2019, 257 in 2020, 219 in 2022, and 189 in 2023.
- ⁸ Source: “[Your Collaboration Process Only Gets You Halfway There](#),” Forrester Research, Inc., October 17, 2022.
- ⁹ Source: “[The Content Platforms Landscape, Q4 2022](#),” Forrester Research, Inc., November 21, 2022.
- ¹⁰ Source: “[Quantifying The Business Value Of SaaS](#),” Forrester Research, Inc., February 4, 2022.
- ¹¹ Source: “Anywhere Work Drives Demand For Modern And Resilient Content Services,” a Forrester Consulting thought leadership paper commissioned by Hyland, January 2023.
- ¹² Source: “[The Content Platforms Landscape, Q4 2022](#),” Forrester Research, Inc., November 21, 2022.
- ¹³ Showing 351 decision-makers in 2019, 257 in 2020, 219 in 2022, and 189 in 2023.
- ¹⁴ Source: “[The Content Platforms Landscape, Q4 2022](#),” Forrester Research, Inc., November 21, 2022.
- ¹⁵ Along with records management (16% growth), the following features of a modern platform are the ones that grew the most in importance since 2019: robotic process automation (27%), metadata or tagging (24%), data extraction and capture (14%), AI/machine learning (14%).
- ¹⁶ Source: “[The Content Platforms Landscape, Q4 2022](#),” Forrester Research, Inc., November 21, 2022.
- ¹⁷ Source: “[The Five Key Trends That Will Shape Your 2022 To 2023 Content Services Strategy](#),” Forrester Research, Inc., September 8, 2022.



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