

## IMPROVING THE CONTENT MANAGEMENT PROCESS

*Content management is a business process that can improve the business processes it is associated with. Sales, marketing, customer service and the partner channel all share benefits when information is available, accurate and available on-demand.*

### ABSTRACT

Content management is an out of control business process that hurts the ability of companies to attract and retain customers. Employees in sales, marketing, service and support are often free to pick and choose content and change or develop whole new content without regard for company standards. Companies lose significantly from this “wild west” approach -- but since the individual losses are small and seemingly isolated, the problems associated with managing content are well masked. Indeed most organizations have never seen a content management process that is sufficiently intuitive and robust to add value to operations, so they are largely unaware of the problem.

By adopting new content management solutions, companies have the opportunity to improve key front office processes including:

**Sales** — increase sales effectiveness and productivity, helping reps spend more time with customers and compete more effectively

**Marketing** — deliver the right content to sales and gather feedback and usage data to make smarter decisions about what new content to create

**Customer service** — provide relevant information to support agents and customers through self-service capabilities

**Channel management** — empower channel partners with key selling materials as an extension of their direct sales forces

New technology offers a chance for organizations to manage their content and better understand how their investments in content affect profit and loss. Platform technology enables buyers to access pre-integrated content management and CRM solutions that offer major productivity boosts for the production, retention and access of a company’s vital information trove. Technology enables management which in turn makes it possible to measure and manage content use in generating revenues and profit.

*A Beagle Research Group Executive white paper*

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## INTRODUCTION

Companies expand in multiple directions at once. Along with increasing revenues and the number of products on offer, fast-growing companies generate large volumes of sales, marketing, and customer support-related content including pitch decks, product brochures, proposals, service bulletins and much more and all of it needs to be managed. Failure to manage a company's content trove can result in lost productivity, lower sales effectiveness, poor customer satisfaction, and unnecessary costs to re-work or even re-develop the same materials. Having multiple versions of content leaves open the possibility that the wrong version will be used — a problem that leads to confusion in the sales process, lost or botched orders, and suboptimal customer experiences. Content has become such a pervasive part of customer and partner interactions that managing it effectively for internal constituencies as well as those who sit outside the firewall has become a critical need.

Earlier generations of content management solutions were made up of either content generation tools or repositories for printed information, but those solutions are inadequate in a Web 2.0 world. Content generation technologies have actually made content management harder. With modern tools anyone can become an author, but too often the output is of dubious quality.

Repositories have made it easy to store and retrieve content, which has only highlighted the need for better ways to identify specific presentations, documents and the like. A successful solution to content management must take into account generation, maintenance and management of all resources including the content itself and the time and money invested in it.

This Beagle Research Group Executive White Paper approaches content management as a business process mediated by specialized applications. Because a process can be managed for profit and to minimize loss, a content management system is no longer an optional addition to a company's sales, marketing, and customer support applications. Putting effective and usable content management solutions in the hands of customer-facing employees has become a competitive necessity for every organization.

## THE CONTENT MANAGEMENT BUSINESS PROCESS

Content management has all the attributes of a business process but in many organizations the process is poorly managed because it has never had the benefit of automation. Many front and back office business processes — including content management — are still manually managed primarily because, until the advent of on-demand technology, automation was expensive or non-existent. Organizations at every level have made tremendous progress in recent years in automating major front and back office processes. With automation comes significantly better accountability, customer satisfaction and elimination of waste. The content management business process is poised to travel a similar path with predictable results.

### *The manual process*

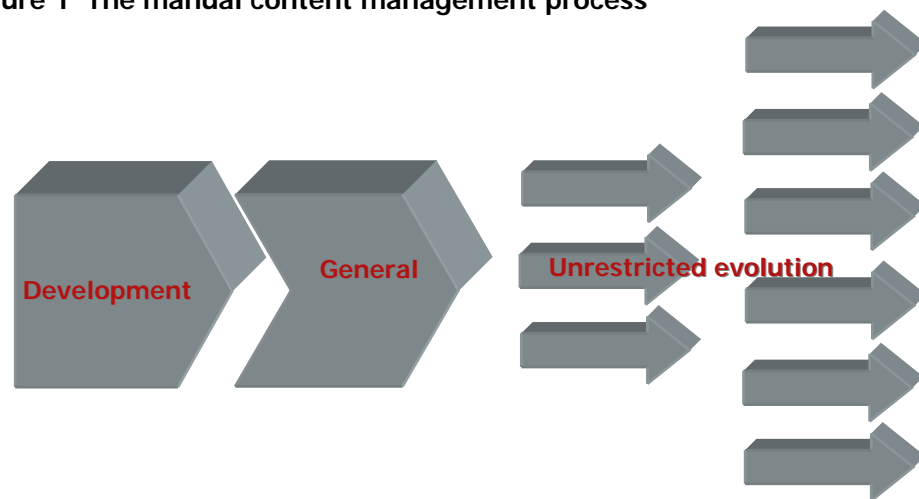
The content management business process is completely manual (Figure 1) in many companies today and consists of these major components:

**Development** — Product and marketing groups are primarily responsible for content creation in most organizations. Sales teams may also make some contributions, such as presentations, proposals and other content in the regular

course of their jobs. Meanwhile, customer support agents are typically consumers of content. Outside of the product and marketing organizations, however, groups like sales representatives are often not under the control of any authority that manages conformity with company messaging standards. These groups may randomly generate content that stays in circulation long after its mission is completed.

**General use** — Once content goes into general circulation within a company, employees may use it as is or begin to change it. Without control over content in general use, messages get muddled and branding is often diluted.

**Figure 1 The manual content management process**



*Source: Beagle Research Group, May 2008*

**Unrestricted evolution** — As time passes, all content ages and should be replaced. For example, sales presentations and collateral need to be refreshed with the latest product information. Marketing departments do a good job of evolving their content, but cannot always be sure that newer content has fully replaced the older versions that sales people have customized for their own specific purposes.

Within the manual content management process, marketing and sales frequently work at cross purposes. Marketing tries to build a more or less consistent set of content and sales — marketing’s primary consumer — uses what it wants, edits and amends it almost at will and provides little feedback about which content works best. Sales people may use incorrect or out of date materials that have already formally been retired, or they may develop their own materials based on specific needs or the tribal knowledge that arises from the prior success of colleagues.

Regardless, the results are the same. After a relatively short time, marketing has lost control of the message and branding and an informal network of sales representatives organizes, copies, edits and distributes the “really good” content. The result is a management process completely out of control, where users create and invent presentations, proposals and brochures and no single version of the truth prevails.

In the indirect channel, the risks are even higher. Partners often build content specific to their offerings without necessarily consulting the OEM. Finally, product groups can also commit the same error with support bulletins.

While leveraging an informal network may be helpful in completing a specific task such as developing a proposal or assembling a presentation, it leaves organizations exposed to errors and omissions that rob sales, marketing and service of efficiency, time and money. An out of control content management process can start a cascade of unwelcome effects that, sooner or later, must be chased down and corrected.

### General shortcomings of the manual process

An out of control content management process has numerous shortcomings that can be summarized as follows.

1. **Lower sales and service productivity.** Customer-facing personnel, like sales and customer support representatives, spend too much time creating and often recreating materials. These groups make their own content when they cannot find something that another department has created or when they need something specialized for a situation or opportunity.
2. **Loss of control over branding and messaging.** Frequently, sales people and others in the informal chain do not start from scratch; they edit an existing document (created on their own or by someone else), often diluting marketing's crisp messaging and branding.
3. **No feedback loop between content publishers and consumers.** Content publishers in marketing and content consumers in sales, customer service, and channel partner organizations don't collaborate systematically. Consequently, publishers have an imperfect understanding of what sales, service, and partner groups need, and content consumers have an imperfect understanding of what publishers have in inventory or can deliver. Often the best source of information about which content is useful comes not from marketing but from another sales or service representative. When marketing is disconnected from the discussion, this unproductive loop goes on indefinitely.
4. **Poor investments in content creation.** Time and money are wasted on programs, materials and in communicating potentially incorrect messages. Organizations fail to achieve the full potential return on their investment in creating content.

## AUTOMATING CONTENT MANAGEMENT

There are several pieces to the content management process puzzle and the optimum solution involves storage, search, social networking, and integration with other systems.

### *Storage technology for fast, simple access to content*

Consolidating content into a repository solves part of the problem. With a centralized content repository marketing has a place to post all content that sales can consistently and easily access. But a repository does nothing to ensure that any particular piece of content can be found or that it will not be edited. Finding and retrieving content is still a challenge for many organizations because the amount of unstructured content continues to grow unabated. Meanwhile, legacy content management solutions cannot handle the job because they were built for back office business processes which differ fundamentally from front office tasks.

For example, in a back office claims process, an insurance company might store documents by customer name, ID, claim number and policy number — which is perfectly reasonable given that insurance claims are likely to be referenced and located by those identifiers. Once the claims are settled the document management system functions as an archive with little need to access the records until they age out of the system. Not so in the front office.

In contrast, requirements for front-office content management are completely different. Sales, marketing, and support personnel, not to mention partners and customers, have a wider variety reasons to search through a content repository than back office users do. A sales representative may need a specific presentation because it addresses a specific vertical industry while another sales user may want to use the same presentation because it is oriented toward a specific role, such as a CEO or CIO. And while a content repository may contain several of each, the user may want only the content that was developed for a specific reason, such as a particular phase in a sales cycle. Under these circumstances a user can only use a repository to retrieve content; the user will need to manually review each piece. Improving on this situation requires meta-data.

#### *Social networking and search to identify the most valuable content*

There is a truism in management circles that you cannot manage what you cannot measure. One of the difficulties with early content management systems is that they provided little user feedback to help managers and content publishers make decisions or understand whether the content fit its intended need.

At a qualitative level, most experienced sales people in an organization can determine which presentation to use in a specific situation or which proposals were the most compelling. However, that information rarely trickles back to marketing in a useful form. In addition, new sales reps have to climb a steep learning curve to gain this knowledge. At a fundamental level, experienced sales people have tribal knowledge but marketing teams and new representatives may not be part of the tribe. Sales teams have better things to do than to report to marketing about which content works best — if they even know — so organizations need a way to cross reference usage and results data to achieve that understanding.

Social networking technology helps sales reps, and indirectly, marketers, by codifying tribal knowledge. When a sales person finds and uses a particularly useful piece of content it is to that individual's benefit to tag it with reminders that the content will be useful in the future. Since a sales representative will want to add tags for his or her own benefit tagging is an example of frictionless information gathering. The marketing department and the organization as a whole will benefit from the information content that tagging generates “for free”.

Frictionless information gathering is not a surprising idea, people do it all the time with minimal technology — the popularity of sticky notes is proof. Many people put tagging information into file names such as “JohnBKPresoAug07” to signify a good presentation for the banking community developed by John in August of 2007. But since there may not be consistent standards for this sort of tagging — and manual systems have little or no search capability — this file is only slightly more likely to be found among all the other presentations in a repository.

Adding social networking technology to content management can help organizations achieve the support they need for an end-to-end content management process in several ways.

1. By associating tags or metadata with specific files a content management system can develop a usage history that tells other potential users about the file without them having to actually open and view it.
2. Intelligent search capabilities make it easy to locate and retrieve tagged materials.
3. As tribal knowledge converges on an opinion about a particular file, analytics can be used to identify the relative strengths and weaknesses of a particular bit of content. This information can help marketing understand what works best.

### *Integration with business applications*

It is even more beneficial if user generated tagging data can be married with sales and service information; this carries two primary benefits. First, users can find relevant content in the course of performing a given business task, rather than having to jump into a completely siloed content repository and start a search from scratch. Second, the combination of content usage data with the results of business activities, such as winning sales deals or closing support cases, provides an indication of which pieces of content are most effective in helping achieve their intended business objective.

Traditionally, content repositories have been completely isolated from line of business software. This approach forced users to switch applications to find relevant materials, and also failed to leverage the current “context” of the task at hand. For example, a sales representative might enter details about products or competitors into an SFA (sales force automation) solution, but would then have to start from scratch to locate pertinent materials about those same products and competitors. This approach frustrates end users and wastes time.

By matching the data a user has already entered into a line of business application with relevant materials from a repository, next-generation content management solutions drive much higher productivity and effectiveness. Not only is the right content much easier to find, but there is also a much higher probability of using it given the automated link to the overall business context.

The second benefit of integration is a function of combining content usage data with actual business results. As a practical matter, content management systems can easily capture usage data, such as the number of times a particular bit of content was checked out. A simple report highlighting which content is used most often can provide valuable insight for content publishers, as well as for new content consumers searching for the best content to use.

Reports or dashboards that combine content usage data with business results, such as closed sales, are even more powerful. For example, knowing that the sales presentation JohnBKPresoAug07 was used eleven times in the last year and that nine deals eventually resulted would be an indication of the presentation’s relevance in the banking sales process. It would be especially valuable to a new sales representative trying to ramp up a territory. Moreover, that information would be valuable to marketing publishers who want to craft high impact messaging. Finally, sales managers might

even be attracted to this data as a way to prescribe a best practice for their sales teams. The sales manager could use empirical data to justify telling his or her troops to use the presentation rather than inventing something else.

Achieving this level of functionality and visibility requires integration. The content management system has usage data but line of business applications, like SFA solutions, contain critical information about which representatives closed which deals and the types of content they used in the process. Sales management needs the integration of all this data in order to define a best practice. Modern platform technology enables this kind of integration to be made even before a customer purchases either SFA or content management thus saving time and resources.

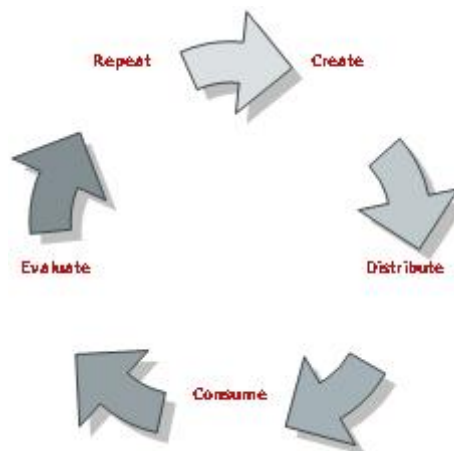
### **CREATE, DISTRIBUTE, CONSUME, EVALUATE AND REPEAT**

By making it possible to evaluate results and feed this information back to users, we make an end-to-end content management business process possible (Figure 2). Actually, any instance of a process may look like a straight line to a user, but for the organization, the real benefit of any process comes from its repeatability.

Thinking in terms of repeatability, one can understand how unproductive it is for a sales person, or any primary content consumer, to develop content from scratch. When a sales person feels compelled to develop content to serve a need, he or she uses valuable selling time to execute a task that should be completed by other individuals within the organization.

Even more importantly, though, the new content short circuits valuable information flows. Marketing never perceives the need for new content and other sales people do not get a chance to add their ideas until the content creation process is complete. Instead, their contributions will only be manifested in more versions of the original — wasting more time and resources. Too often, no single additional version captures all of the good ideas or tribal wisdom that might normally accrue if marketing ran the process and solicited ideas in an orderly manner.

**Figure 2 The content management business process**



*Source: Beagle Research Group, May 2008*

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## THE ROLE OF THE ON-DEMAND PLATFORM

Prior to the introduction of on-demand technology, many business processes like content management received minimal attention from vendors. Sometimes referred to as orphan processes or as long-tail applications, there were few, if any, automation solutions that addressed the needs of these application areas. Vendors shied away from orphan processes because they were not profitable and potential customers either developed partial solutions in-house or did the best they could to get by with manual systems.

Without a content management solution, companies had to use manual processes with all their inefficiencies and waste. However, because the inefficiencies and waste were spread across a large part of a company, their impact was subtle. No one knew the exact cost of an inefficient content management process because no one knew what an efficient solution looked like.

On-demand platform technology from salesforce.com (Force.com) for instance, has helped to solve the content management challenge in several ways. Salesforce has used its platform to pre-integrate its CRM applications, including Sales Force Automation, Service & Support, and Partner Relationship Management, with Salesforce Content. To get maximum return from a content management application requires data from the content management system itself as well as the CRM application, for reasons already cited. Moreover, platform technology also enables users to choose which analytics and display technologies to use to best understand content use and results.

Under ideal conditions, these same results could be achieved with traditional applications. But few vendors have shown an appetite for taking on the integration work that comes essentially for free from an on-demand platform, and few, if any, customers have an interest in paying for that integration. Furthermore, the very nature of on-demand applications makes them ideal for sharing content across company lines with partners and customers — communities where firewalls have traditionally been major obstacles to effective collaboration.

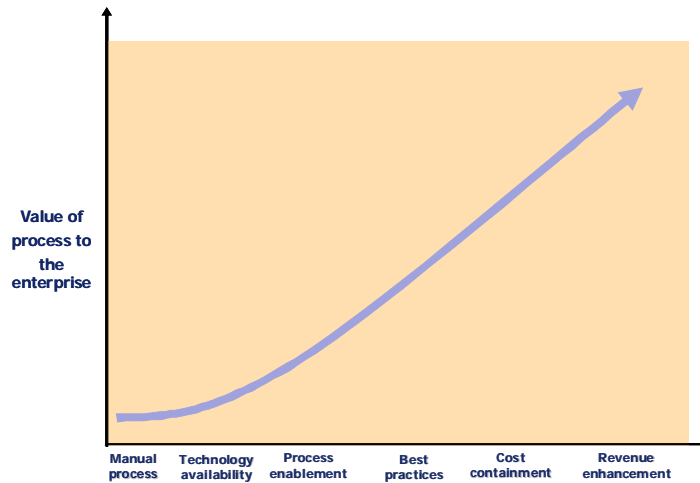
Automating the content management business process is a clear example of how on-demand computing and specifically on-demand platform technology can open up a new application area.

## CONCLUSIONS

Content management is both a business process and a software category with increasing significance. Now that many organizations have addressed their core front and back office computing needs, optimizing secondary processes like content management makes sense. These processes offer the richest opportunities for cost containment and for obtaining overall margin improvement.

Any business process follows a maturity model such as the one described in Figure 3 above. A manual process may provide some value to a business but hidden costs may exceed its worth. By introducing technology to manage a process a business begins to put in place the controls that enable repeatability and with it, cost containment and improved margins.

Figure 3 Maturity model, the value of a process increases with automation



Source: Beagle Research Group, May 2008

The automated content management process enables businesses to reduce the costs associated with developing and managing their content and helps them refocus customer facing employees on their primary jobs of attracting, serving, and retaining customers — not developing content.

Managing content well requires automation and integration. The automation comes in the form of a repository, intelligent tagging, social networking features, and deep search capabilities. Integration is also needed between the content repository and CRM applications to provide the contextual information required to cross reference content usage and business results, thereby delivering valuable information to all parties in the content management process.

The content management process with its interdependencies and resulting potential for improved business results points to an important future direction in the software industry. More than simply providing support for managing departmental records, business applications are increasingly being used to mediate a whole business process. This change of orientation will become more visible over time and it will increasingly rely on platforms and integration.

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