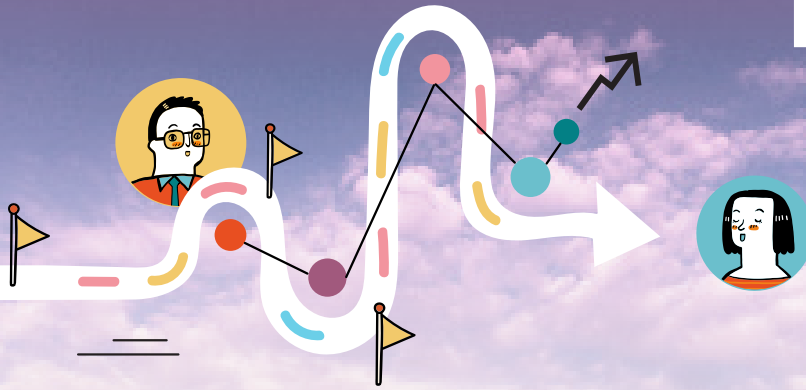


# Information Management Key Findings



## INTRODUCTION

**Information Management initiatives can radically transform how organizations manage and leverage their data, but getting employees to engage with them is a challenge for 62% of IT professionals. Fewer than 10% of information workers typically participate, which doesn't bode well for success. The secret to making these programs thrive is finding the right balance between productivity and compliance.**

Considering the plight of end users isn't often the top priority for stakeholders planning Information Management projects. Security, standardization, and top-line business objectives generally rule the day and drive decision-making.

But ignoring the end-user experience can prove deadly for even the most technically superior solutions for one simple reason—if people don't use it, it doesn't matter how great it is. It makes no difference whether end users don't see the point or find it too complicated, confusing, or cumbersome... the result is lackluster adoption and compliance.

That's why Information Management leaders must simultaneously prioritize a frictionless, enticing user experience and compelling end-user value proposition that conveys why this change is helpful for both the individual and the entire organization. In this paper, we'll touch on the four pillars of implementing and rolling out successful Information Management initiatives.

First, we'll explore why Information Management initiatives often struggle to catch on with end users and how the right communication strategy can be a difference-maker when it comes to adoption. Next, we'll zero in on one of the biggest obstacles to widespread compliance and how to bring a user-centric approach to selecting solutions and designing the optimal end-user experience.

From there, we'll dig into the key role analytics must play when launching and nurturing Information Management initiatives, both as a measurement of success and to uncover issues putting a damper on adoption. We'll wrap things up by peering into the very near future and discuss how Artificial Intelligence will impact Information Management and early opportunities to leverage its potential for increased end-user productivity and efficiency.

# Information Management Key Findings

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# 1. Unlocking Adoption Success

## How Communication Shapes Information Management Outcomes

For Information Management professionals, success is often out of your hands. You can design the best processes, acquire great technology, and execute against your roadmap, but most of the time organizations don't truly reap the rewards of these projects without a significant portion of end users doing their bit by consistently following protocols and utilizing the tools you've provided to them.

However, fewer than 10% of information workers typically participate in Information Management initiatives, and that number decreases by 1% every year. That skimpy adoption rate means the organization will see little benefit from those changes and potentially remain dangerously out of compliance.

This was the top challenge cited in a survey of more than 50 IT professionals, with 62% finding it difficult to engage users in Information Management programs. It turns out that one of the biggest hurdles in rolling out new technology and processes has nothing to do with databases or project plans... it's communication.

## Why Information Management Initiatives Don't Connect with End Users

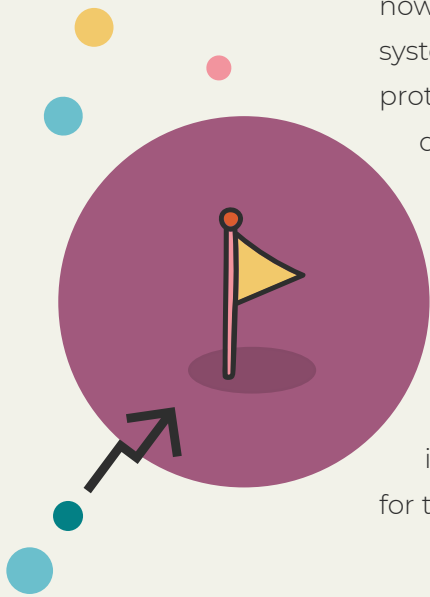
When organizations think about Information Management initiatives, it's usually in terms of their impact on the organization itself. An email retention and disposition policy, for example, is likely designed to comply with a regulation or to satisfy a security requirement, which are organizational goals and objectives. ▼



However, for an individual employee, regulatory compliance and information security are often pretty abstract concepts. Most workers are just trying to complete the tasks assigned to them with as little distraction or disruption as possible. They're not worried about Information Management because that's not their job.

So when a mandate comes from on high that you must now take this extra step or switch from this system to that system, it's seldom welcome news. While it's true these new protocols may be necessary and appreciated by some, that doesn't mean much to the colleague who just feels forced to do something differently.

And since most end users don't have much motivation to change their routines, many of them won't, despite the barely skimmed memos and tuned-out mentions in staff meetings. From their viewpoint, there's little incentive. "Metadata" and "email archiving"—what's in it for them?



## Turn on your inner marketer

For Information Management initiatives to truly get traction and create true, lasting changes at scale, they need to be positively positioned by selling, not telling. And the only way to effectively market to a prospective customer is to approach things from their perspective.

Forget for a minute that you spend lots of your workday thinking about Information Management and that your own professional future is tied up with a given effort's success. Now you're just a regular employee that works in accounting or logistics or manufacturing or sales. You don't think about systems and software, you just use them to do your job.

Ideally, an increasing share of Information Management goals can be achieved via improved user experiences and via behind-the-scenes automation. But if the only way to reach those objectives requires imposing new requirements on end users, remember that will only happen if they're properly educated and motivated to comply. ▼

## To win over reluctant end users, try some of these tactics:

- **Identify benefits for end users:** While organizational-level objectives might hog the internal headlines for a given initiative, chances are there are at least some perks for the rank-and-file workforce. Dig into what pain points these changes might alleviate for end users. If it's not obvious, work backward to connect how the Information Management-driven change will impact their everyday lives and find some positives.
- **Create compelling messaging for end users:** You're in sales mode at this point, so try to spin up some talking points that concisely convey end-user benefits to that audience, sprinkling in a bit regarding how this helps the organization as a whole.
- **Execute a multi-pronged communication strategy:** Don't rely on direct communications from IT alone. For your Information Management projects to succeed, you must hit your target audience from multiple angles. Ensure that managers and executives are all touting both the importance and the tangible benefits of adoption. You can further socialize these initiatives by holding lunch-and-learns, making guest appearances to give demos at staff meetings, and providing a dedicated support "hotline" for colleagues struggling with the change.
- **Bake it into performance goals:** Whether at the team or individual level, find the most impactful KPI (Key Performance Indicator) that tracks uptake and adoption. With this

## Maintain momentum by leveraging transparency and accountability

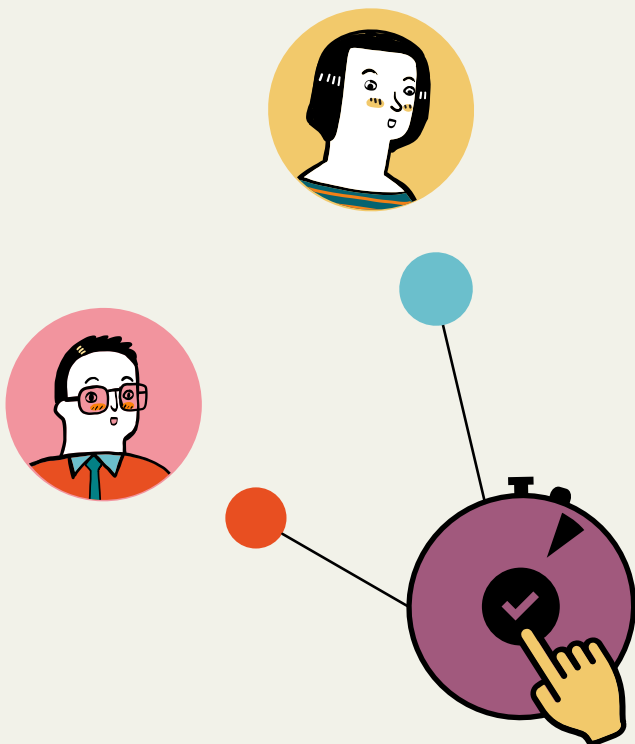
After the dust settles following the initial launch of any initiative, Information Management leaders must continually work to ensure adoption remains high and continues increasing over time. That demands an ongoing effort to keep it on everyone's radar.

This may require some uncomfortable action, such as highlighting the fact that your initiative has fallen short of its adoption, compliance, or usage targets. While touting disappointing numbers may feel counter-intuitive, by elevating visibility into how things are progressing you'll be able to continue enlisting stakeholders and supporters to do their part to continue touting the importance of the initiative and the potential positives and negatives that may come based on widespread adoption (or lack thereof). ▼

## 2 .The **Secret Sauce** of Great Information Management

Many Information Management initiatives yield modest results because only a fraction of end users actually participate and comply. What's often holding colleagues back from adopting these solutions is the end-user experience—i.e. how they experience and interact with new technologies and processes—which often receives little attention or gets completely overlooked when designing and rolling out internal solutions. This requires IT to not only worry about infrastructure and data but also how things function on the front end for everyday employees trying to complete their core tasks.

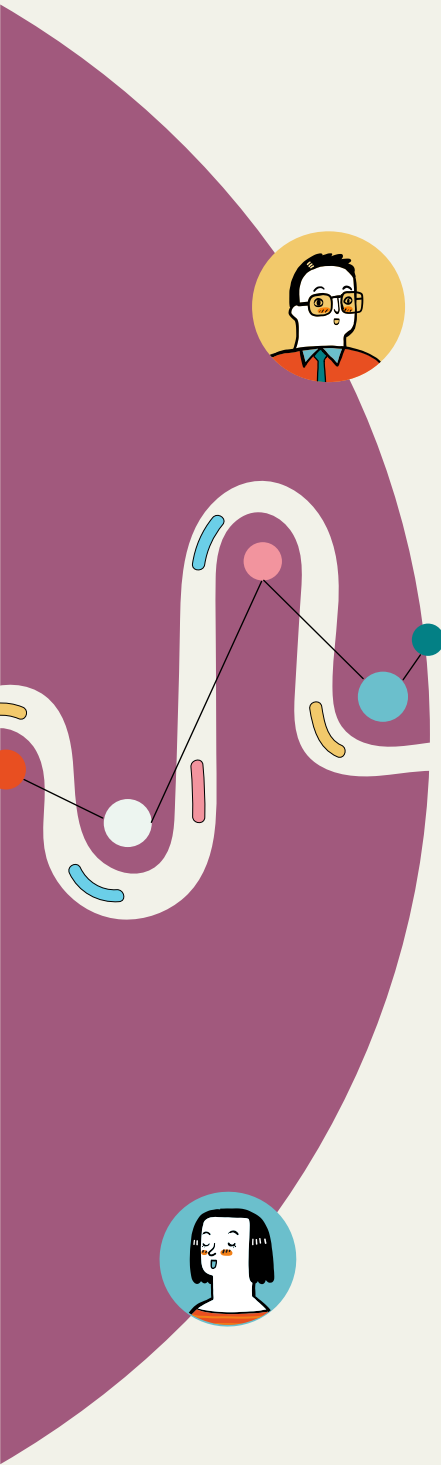
Ultimately, any Information Management initiative's success will be judged on its impact, and it takes widespread compliance to move the needle in most cases. Neglecting this aspect can be a fatal flaw in any Information Management project, so IT must make it a top priority to deliver an efficient, intuitive, and streamlined user experience. Let's dig into why UX matters even for internal-facing projects and how IT can incorporate a design sensibility into their planning.



### **Why UX matters**

UX is shorthand for the overall user experience. While the UI (user interface) gets most of the attention, UX encompasses how end users feel about their experience, such as how easy, fast, convenient, and intuitive it feels.

Designing a frictionless, engaging user experience is table stakes for any B2B or B2C application. For consumer-facing websites, a sub-par UX is a near guarantee that the consumer will take their business elsewhere, as 89% of consumers will switch to a competitor after a poor experience. ▼



For information management initiatives, instead of trying to delight and satisfy consumers, the goal is to ensure end users—fellow employees, knowledge workers, and contractors relying on these solutions—can quickly and painlessly complete core tasks. If a new process isn't designed and delivered in an intuitive, streamlined manner, end users may feel lost, frustrated, ignored, or even resentful that they must add additional, clunky steps to their daily workflows.

While employees can't shop around the same way a consumer might, they still have some agency. If they don't enjoy using a new system or struggle with a redesigned workflow, they might just keep doing things the old way or opt out altogether. Even if they do grudgingly become adopters, they may only use things a fraction of the times they could or should be doing so.

Slow loading times, confusing navigation, outdated content... any of these factors lead to sky-high abandonment rates when users have a choice. That's why software companies on average devote 20% of their R&D budget to UX.

A poor user experience is about more than pixels and mouse clicks, however. Asking them to slog through a painful, confusing, lengthy process on a regular basis indicates that the business doesn't value their efficiency or productivity. Even if it's good for the organization, it doesn't feel particularly good for them.

## Taking a user-centric approach

Given that the goal of Information Management initiatives is maximum participation, incorporating end users early on in the process is key. Before you can design a good user experience for the project, you need a greater context of the current state of affairs.

Good UX practices include:

- Minimizing steps and clicks
- A clutter-free and responsive UI
- Consistent naming, color coding, keyboard shortcuts, menu layouts, etc.
- Clear labeling that matches the expected results
- Easy to find and available where needed
- Putting yourself in the end user's shoes and understanding how this process fits into their overall workflow and daily routines

This final bullet highlights the importance of performing user research on how end users complete tasks today—including their complaints, pain points, and homegrown “workarounds.” This insight is essential to understanding how any Information Management initiative can fit into and ideally improve upon the status quo. While IT ideally has the time, bandwidth, and expertise to conduct some of this research itself, solution vendors specializing in this space have already done much of that work for you. This is yet another benefit of working with companies that have invested heavily in the user experience and not just the underlying technology.

Information Management initiatives should also strive to incorporate end-user feedback into the entire design and delivery process. Organizations can recruit enthusiastic end users to do everything from trying out products from third-party vendors to reviewing wireframes for new user interfaces and workflows, providing insights only they can ascertain based on their everyday work lives.

Uncovering these insights and addressing potential issues before and during development maximizes the project's chances of success, as the top end-user concerns and complaints will have already been mitigated before deployment. Plus, when it's time for QA and beta testing, end users are the ideal participants given their domain expertise.

And once launch time arrives, who better to help train colleagues than these super-early adopters? Because they've been involved in the project all along, they're now invested in its success as well and will add credibility and specificity when educating their peers.



## Emphasizing the user experience in harmon.ie

For technical specialists, investing in user experience may feel like an expensive use of resources for an internal project. But it pays dividends in the long run because making the right thing to do the easy thing to do increases participation rates.

At harmon.ie, we found that making key information capture operations through a simple, intuitive, drag-and-drop interface combined with a tree view spanning Microsoft 365 apps such as SharePoint, Teams, and OneDrive boosted compliance. It shrinks the learning curve and doesn't introduce any fundamentally new concepts.

A good user experience also helps the user avoid context switching, which can be a major drag on worker efficiency. Users get confused and fatigued by continually moving from one context to the next (e.g., Outlook to browser, browser to Teams, Teams to Outlook), which decreases the odds of proper information capture and classification occurring. Since harmon.ie users can complete those key tasks all from Outlook, end users can do them quickly without interrupting their flow.

Firmly rooted in these two UX principles, harmon.ie customers have reported an increased Information Management initiative adoption rate.



# 3 .Leveraging Analytics to Drive Information Management Priorities

**“You can’t manage what you can’t measure.”** This famous adage from management guru Peter Drucker is universally applicable. There’s no way to assess progress if you can’t compare where you are today versus yesterday, and you don’t know how big or small a problem really is until you quantify it. This all holds true for Information Management as well.

## Why measurement matters

When decision-makers don't have data, they're operating purely on hunches and gut instincts, but that's no way to run an organization. Prioritizing initiatives—not to mention allocating budget and resources—should be data-driven undertakings so stakeholders can properly prognosticate the downstream ramifications of each effort under consideration.

Leadership usually knows when an issue requires attention, but they often lack a proper sense of the full scope and scale of the situation. For example, the management team may be aware that all communications regarding financial transactions are subject to regulatory scrutiny and must be properly classified and retained for future audits. But they likely don't know whether that's 100 emails per month or a thousand, how many different employees may have those emails in their inbox, or what percentage of them are already handled properly.

Without that baseline understanding, there's no analytical way to determine how urgent or large the problem is nor the potential impact of a change. Lacking that information, it's tough to decide how much money and resources to expend on the solution.

Is it two employees or two dozen? Is it two emails per week or two hundred? Those numbers play a big role in how much to invest and how broad the policy change must be. ▼

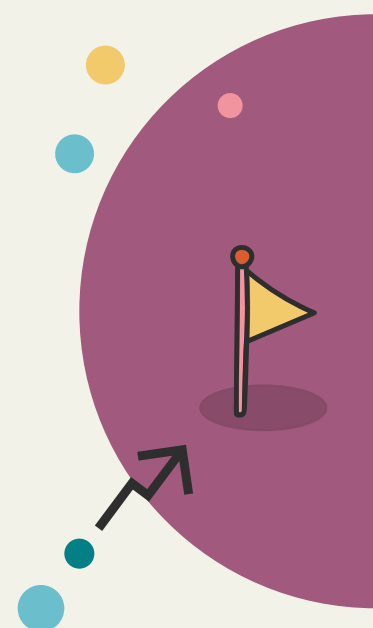
Beyond merely using these metrics to gauge the severity of the current situation, they're also integral to tracking and measuring progress once a change gets implemented. Ongoing monitoring of each Information Management initiative helps leadership see the effectiveness of those changes, giving them the data they need to make recommendations for adjustments and refinement. It also builds confidence in the overall efficacy of Information Management initiatives in general, which can increase the likelihood of green-lighting and funding subsequent projects.

## Measure what matters

Once you start looking, there's no shortage of potential things to measure. However, less is often more in these cases. To avoid analysis paralysis or overwhelming busy senior leaders with too much information, it's best to zoom in on a few Key Performance Indicators (KPIs). They should correlate with the strategic goals of the Information Management initiative at hand.

Using our example above, a KPI might be the number of emails archived in SharePoint or Microsoft Teams or how many end users archived at least one email during a given week. Increasing those KPI numbers would be a strong indication that the project is gaining traction and helping the organization reach this Information Management goal.

Just as important, however, is ensuring that the organization isn't focused on metrics that don't mean much or aren't particularly actionable. Before building extra instrumentation or adding another chart to your management briefing, consider whether it's meaningful to leadership and if that data contributes to the decision-making process. This helps the team avoid "vanity metrics" that distract leaders from more relevant trends and insights.



## Putting metrics to work

Information Management initiatives often face an uphill battle when it comes to convincing different business units or teams to change their behaviors and adopt new processes and tools. These groups already have their hands full completing tasks and meeting current demands, so there's little appeal to switching things up or adding extra steps to their routines. ▼

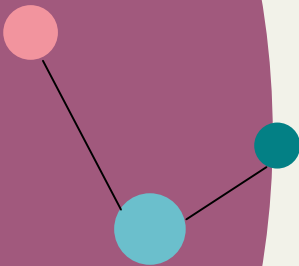
To boost adoption, Information Management leaders must convince business unit heads and team leaders to embrace these initiatives and prioritize compliance for their staff. They know any alteration to the status quo will bring some amount of disruption that could potentially impact performance and productivity.

By introducing metrics and KPIs to the conversation, Information Management can make a far more compelling case. These metrics can illustrate the severity of the current situation, quantifying the severity of a problem that some may have thought trivial or minor. You can also use benchmark metrics and KPIs from other groups that have already implemented the initiative to illustrate the positive impact of the change and assuage concerns regarding performance degradation.

Coupling these data points with the overall business goal and rationale for the initiative helps win over both the higher-ups and individual contributors, who can all see the material benefits of adopting and regularly using the new tool or process at hand. Over time, those same metrics and KPIs can help maintain momentum by tracking progress and providing a more holistic view of the benefits.

Comparing compliance rates between different teams and business units can also foster a little healthy competition, further boosting adoption. These metrics help IT make the business case for continuing to use any licensed software, tools, or services that enable the Information Management change.

At [harmon.ie](https://www.harmon.ie), we're committed to giving our customers the information they need to make data-driven decisions and track their results. We're working with Mixpanel, a product usage analytics leader, to gather compliance and collaboration data that can be shared with customers for their reporting and dashboard needs.



## 4. AI-Driven Information Management is (Almost) Here

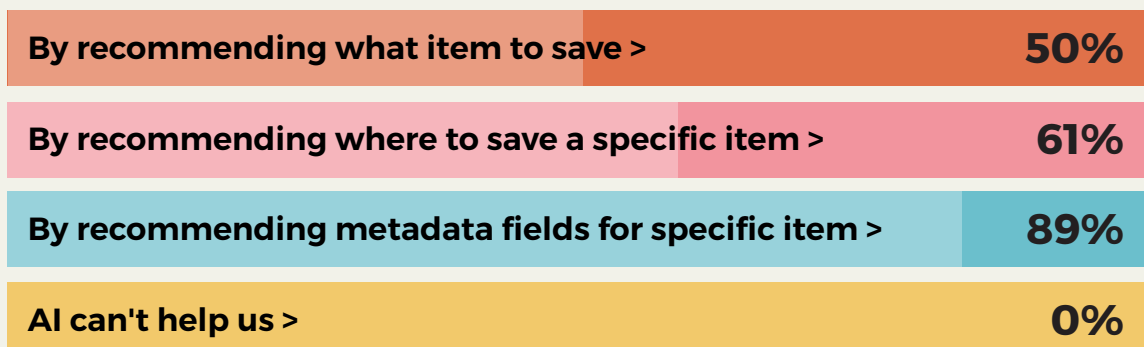
Rules alone were never going to be a sufficient solution for comprehensive Information Management. Beneath all the hype and headline-grabbing—can artificial intelligence fill that gap?

AI has so much future potential that, for many, it's hard to figure out where it might realistically and practically add real value today. At harmon.ie, we've moved past theory and speculation and are already deep into leveraging AI's full Information Management potential... we even devoted our first-ever hackathon to exploring this topic.

And while AI may eventually do all kinds of things, there are a few areas Information Management leaders are excited about in the near term. In one of our recent surveys, the top pick for where AI could help organize information was recommending metadata fields for a specific item (89%). This was followed by recommending where to save specific items (61%) and then by recommending what items to save (50%).

### How could AI help you manage your organizational information?

Poll Results (multiple answers allowed):



Luckily, all three of these choices are closer than you'd think. harmon.ie teams are hard at work to bring these to life in 2024. Supervised training of the Large Language Model (LLM) on record captures from identified centers of excellence can contribute to the automation—or semi-automation—of core Information Management operations. AI learns by example, so if you educate it on the ideal, it can then apply that logic to larger data pools. This is what differentiates it from rigid, specific rule-setting, as it can help even with vague Information Management conventions.

AI-powered solutions can identify important emails or attachments still in end-user inboxes, sifting through the clutter to find the emails that matter. Once identified, users can get suggestions for the ideal locations to save those emails or attachments, such as specific folders on SharePoint or Microsoft Teams. And, during the integrated saving process, end users can be prompted to enter metadata, with suggested values offered for each field.

## Why these types of Information Management AI applications matter

Compared to some of the AI-related excited buzz and hand-wringing out there, the AI-powered applications listed above may not seem like a big deal. Contrasted with self-driving cars and bar exam-passing GPT engines, they're definitely not the sexiest ways to put AI to work.

However, the problems of identification, classification, and organization are very real for knowledge workers and their organizations. Countless hours are wasted daily by end users browsing through one file directory after the next, searching in vain for the files they need. The problem grows exponentially as each new email or attachment gets saved in an incorrect location... or never shared beyond the recipient's inbox at all.

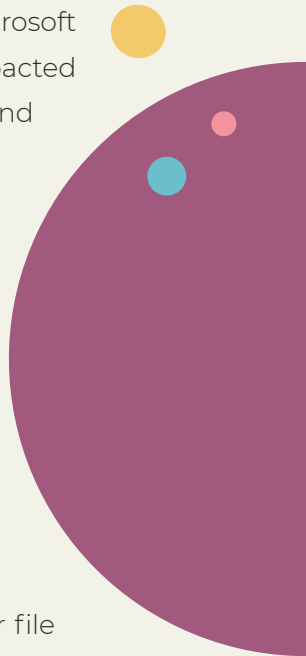
The ramifications of not properly sharing emails and files to SharePoint or Microsoft Teams are more wide-reaching than some imagine. Business performance is impacted at every step, whether it's end users wasting time deciding which messages and documents to share, figuring out where to put them, or struggling to determine which metadata values to add.

That doesn't even factor in all the cycles burned trying to find emails and files shared by others, which creates all kinds of downstream trouble for different functions, such as account managers looking for context on customer engagements or fulfillment trying to make sense of what salespeople promised prospects. Inconsistent sharing, archiving, organization, and metadata assignment can also lead to version control issues as well as creating information silos where they shouldn't be.

Beyond all that, there are compliance and legal issues to consider. Every email or file is a legal liability, so some organizations enact strict protocols and processes for either retaining or destroying messages and documents based on their age and/or contents. AI can automate many of these steps, reducing the burden on staff while improving the accuracy and thoroughness of archiving, retention, and destruction activities.

When AI is incorporated to help out with these matters, it reduces the burden on end-users to be proactive regarding every single email or file they receive. Instead, they get alerted as to which messages and documents should be shared, which location is best, and prompted with suggested metadata fields.

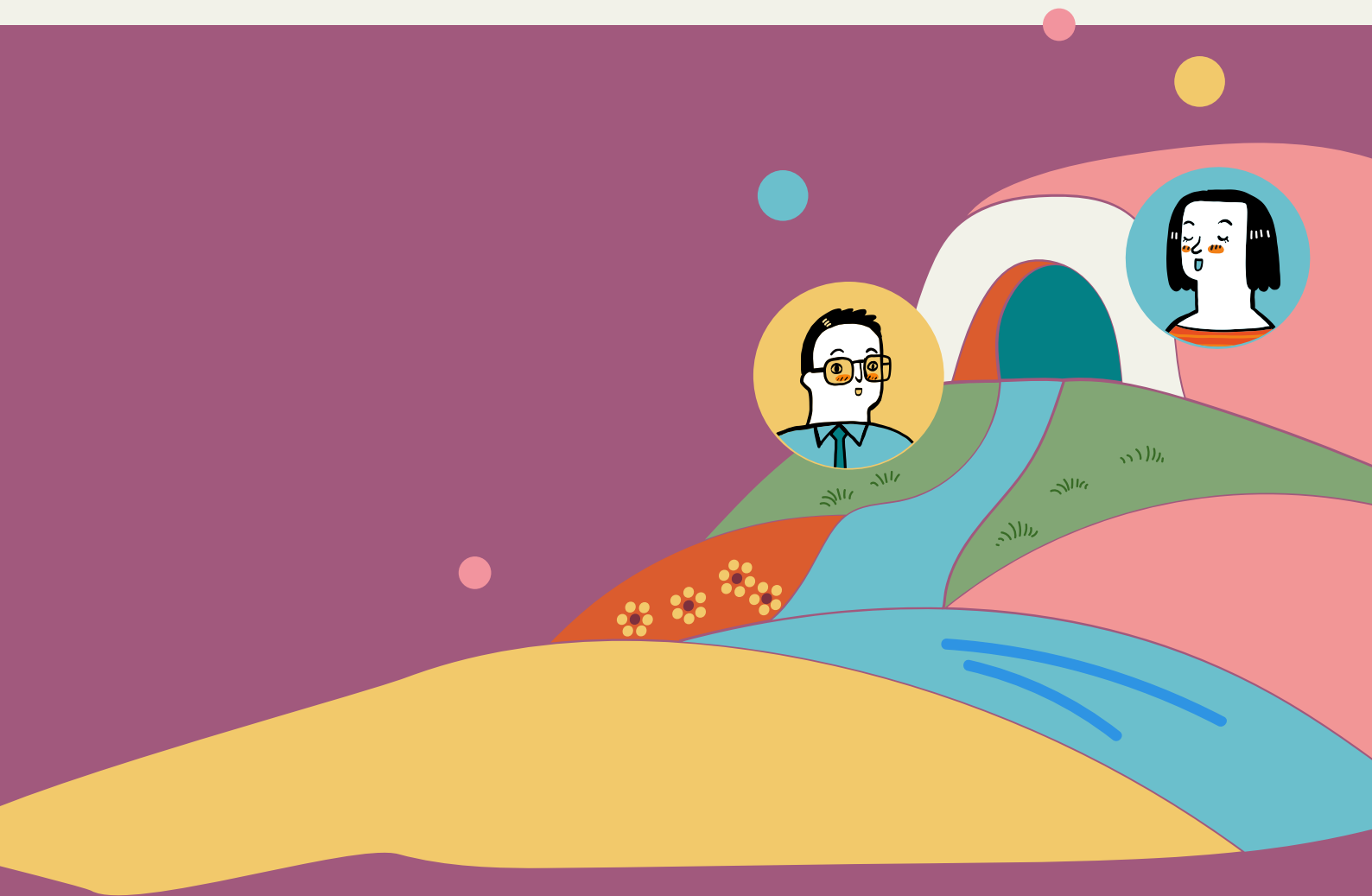
This runs counter to fully manual processes that put the onus on end users to make all these decisions. The chances of them doing it correctly every time—or even remembering to do it at all—are slim. There are too many judgment calls and distractions compared to the consistency AI offers.



## Bringing AI to the UX

While some AI-powered Information Management activities will take place 100% behind the scenes, when it comes to classification and organization, end users should often play a role. Instead of filtering, sorting, storing, and tagging every email and document without any human intervention, these solutions highlight the emails and files that need attention and then guide and prompt end users through the classification and organization steps.

Since harmon.ie's solution for Microsoft 365 puts these activities right into the end user's Outlook experience, our AI-driven enhancements will empower workers to quickly complete these tasks without disrupting their overall workflow. With a dash of selective highlighting and a pinch of drag-and-drop functionality, harmon.ie makes proper classification and organization of emails and files a no-brainer.



# 5. SUMMARY

By now it should be evident that Information Management initiatives are about much more than just technology. We've reviewed the importance of end-user engagement, designing solutions with a user-centric approach, how to leverage analytics to track and improve the progress of Information Management initiatives, and some early AI opportunities.

- ✓ To help put these ideas into action and maximize your organization's return on investment, here's a checklist to ensure nothing gets left out.
- ✓ Create messaging around the IM initiative that conveys the end-user value proposition.
- ✓ Create a comprehensive communication plan that leverages multiple communication channels and is aligned with deployment and rollout.
- ✓ Incorporate Information Management compliance into corporate, team, and individual goals to incentivize compliance and signify its strategic importance.
- ✓ Review current workflows and processes to understand challenges and chokepoints before getting into solution design and definition.
- ✓ Utilize third-party products that seamlessly integrate with current applications in use.
- ✓ Conduct usability testing throughout the process to ensure business performance isn't negatively impacted.
- ✓ Establish success metrics based on business goals and what's readily measurable.
- ✓ Track and socialize progress toward goals, using incentives and internal competition to encourage increased compliance.
- ✓ Tap into AI-enabled solutions that focus on improving end-user productivity with recommendations and suggestions.

**Follow the steps above to make your next Information Management a smashing success!**