IT's next challenge: Three key trends in document collaboration and exchange

Meeting knowledge workers' demands in 2011 and beyond

The array of enterprise communication formats available today has expanded, ranging from instant messages to blogs and wikis, as well as more traditional means such as email and internal web pages. But documents, including proposals, requirements, plans, agreements, and reports, remain the primary currency of business, and document collaboration continues to be a core activity of knowledge workers in their day-to-day work. As a result, knowledge workers are demanding and need more efficient and effective tools for document collaboration and exchange. As IT organizations look to enhance or expand their enterprise collaboration capabilities, they should consider three important trends and their implications:

- Project teams that span multiple third-parties are becoming the norm, and the need to maintain security outside the firewall is increasing.

- The need for dynamic documents that enable more effective and engaging communications is growing.

- Reducing costs via better efficiency remains at the top of the executive agenda.

Global collaborators are distributed—inside and outside the enterprise

Increasingly, enterprises are made up of teams that are scattered far and wide. Based on a 2009 Forrester Consulting study commissioned on behalf of Adobe, "Building the Future of Collaboration," 73% of knowledge workers collaborate with people in different time zones and regions at least monthly. But these diverse teams aren't just inside the enterprise: 67% of employees report working with people in other companies at least monthly. "As collaboration grows in importance for knowledge work, the tools must embrace and refine current work habits, while also enabling a transition to more efficient and effective communication and collaboration," Forrester Consulting reports.

Distributed teams are no doubt driving the need for better collaboration tools—especially when it comes to document exchange. Workers frequently collaborate and exchange documents with people outside the company, such as suppliers, partners, agencies, and customers. It's a growing practice that can be inefficient and cause security concerns. Most companies today will suffer a clear financial consequence if confidential information is leaked. For this reason, IT needs to provide a document collaboration tool that enables workers to protect company information, even when documents travel outside of the document management system and the corporate firewall.

A case in point is *Bombardier*, the world's largest civil aircraft carrier. The company must provide pilots and technicians outside its company with comprehensive training manuals. "While we want to make these documents easily accessible to authorized viewers, we realize the materials contain a tremendous amount of intellectual property that needs to be protected," says Ken Knitter, supervisor of web-based training and learning for the company.

By migrating to PDF and an Adobe solution, Bombardier saved hundreds of thousands of dollars distributing documents, such as training manuals, while better controlling access to sensitive information by parties around the world.

"Adobe software saved hundreds of thousands of dollars in the distribution of training manuals, while delivering control over document access."

Ken Knitter
Supervisor of web-based training and learning

IT's next step

Take stock of the document collaboration landscape in your organization. How are knowledge workers currently collaborating and exchanging documents, and which tools are they using? What is the cost-effectiveness of the current process? Where in the pipeline could IT improve document collaboration among disparate teams to bolster the bottom line? Is your organization at risk of exposing confidential information when documents are not secured outside of the firewall?

Demand for dynamic documents is growing

The expectations around documents are changing. With the increase of devices and software available to more easily produce rich content, knowledge workers want to use rich media to deliver better context around information and to produce more engaging, compelling content. This is fueling the shift from static documents to dynamic documents.

Unlike traditional static documents, dynamic documents are interactive. They can include links, buttons, embedded calculations, and rich content, including drawings, images, videos, embedded web pages, and forms. Dynamic documents display and behave as intended across platforms. They are also easy to create, can be shared with others using existing means, can be secured, and can be quickly integrated into existing document-based processes or document management systems.

Most knowledge workers across the enterprise report the need to create high-impact communications at least once a month, with 76% needing to combine multiple file types such as text, images, videos, and forms, according to the 2009 Forrester Consulting study. Dynamic documents allow knowledge workers to perform their work more easily and efficiently:

- **Communicate complex processes or concepts**—Dynamic documents simplify and streamline the communication of complex ideas. By empowering employees with the ability to easily combine drawings, images, and video along with written documents—for example, in the course of new product development, training, or supply-chain sourcing—they can accelerate understanding and decision-making.

  For example, *Sundt Construction*, one of the largest general contractors in the United States, oversees construction projects costing tens of millions of dollars and involving hundreds of subcontractors and vendors. By using interactive plans in PDF, construction supervisors and others can click on specific portions of a plan and immediately link to the appropriate page or detail. Shortcuts to specific pages and detail views make answering questions a fast, straightforward process.

- **Efficiently receive and process rich content**—With the explosion of rich content, employees increasingly need to be able to easily receive, review, and approve content containing photos, audio recordings, or video. And this exchange needs to be efficient for less tech-savvy parties.

  The *Ontario Homicide Investigator's Association* (OHIA) in Canada faced this challenge with case information, which can include crime scene photos, recorded audio of witness interviews, police reports, and paper documents. Aggregating the information for court submittal was manual and time-consuming. In addition, searching through the information was extremely difficult. OHIA solved this problem by creating an e-disclosure, taking advantage of PDF and PDF Portfolios. This e-disclosure process is being adopted by law enforcement agencies across the Canadian Province of Ontario. Investigators and case managers can now build an e-disclosure in days instead of the months previously needed to prepare information. Detectives have more time to devote to investigations, and the quality and availability of content delivered to courts, defense attorneys, and prosecutors has improved. Law enforcement departments are saving significantly in paper and delivery costs, which can total tens of thousands of dollars for large cases.

- **Be more persuasive**—Dynamic documents enable knowledge workers to deliver more compelling presentations and proposals. For instance, dynamic documents can help sales reps elegantly combine sales and marketing materials, including video-based customer testimonials and self-running product demos, to more effectively convince customers of the benefits of their solutions.

  Dividi Projects is a UK-based marketing communications firm that creates interactive, rich media presentations for corporations and organizations. Using interactive PDF documents, Dividi helps ensure that clients maintain the highest levels of branding and graphical design to engage and communicate more effectively with their target audiences. The broad adoption of the free Adobe Reader® means that the content can be viewed regardless of the platform.

IT's next step
Evaluate the current and future requirements of dynamic documents in your organization. How can IT's infrastructure better support the increase of rich media within documents and do it efficiently? Can the expanded use of PDF documents enhance dynamic communications and reduce IT costs in your company?

IT faces continued pressure to reduce costs via better efficiency
Improving business processes and workforce effectiveness remain at the top of the priority list for many senior-level executives. By standardizing on the right productivity applications as a part of the core desktop image, IT can improve productivity and enable knowledge workers to be more efficient in the following ways:

- **Speed up content reviews**—Most knowledge workers find that content reviews are a part of their weekly, if not daily, workload. At the same time, the document review cycles between an enterprise and its vendors, subcontractors, and customers can add days—even months—to project timelines. For instance, workers don't want to continue to be forced to manually export, email, and import comments from multiple reviewers. Workers throughout the organization need a tool that helps them better manage and expedite internal and external reviews to get products to market quicker and increase responsiveness to customers.

- **Accelerate approvals**—Whether for internal business policy, compliance, or regulatory reasons, clear tracking of who approved a document and when is often required as part of the process. Efficient electronic approvals that can be archived with the original document can mitigate business risk when questions arise or litigation occurs. An approval solution should have the flexibility of scaling from a simple electronic approval, such as a stamp or electronic signature, to a more secure and verified method such as a digital signature.

- **Reuse content more easily**—Reformatting and reorganizing information and media to create a new document or presentation is a productivity killer for many workers. Adobe market research found that 40% of knowledge workers say they would like the ability to edit or reuse PDF content and not have to go back to the original source file, They also need to be able to reuse content in a PDF file in other formats.

- **Find information faster**—Whether an enterprise's content is paper or digital, workers waste significant time searching for information. According to a 2009 IDC report, "Hidden Costs of Information Work (Doc.# 217936)," the time spent searching for information averages 8.8 hours a week, for a cost of $14,209 per employee per year. Reducing this time can improve productivity significantly.

- **Create and manage forms better**—Although departmental forms and many internal corporate forms are in electronic format, such as Microsoft Word or Excel or static PDF, they are often processed in a manual way. Automating these forms is often a low priority because of the associated IT time and resources needed. However, an easy-to-use, self-service forms solution that empowers knowledge workers to automate their departmental forms can ease the burden on IT. This solution must be intuitive from form creation to distribution and data collection. Knowledge worker productivity software that already bundles this capability can help streamline costs and reduce the need for IT to support additional applications.

- **Automate common tasks**—As a part of internal processes or compliance with corporate policies, employees might be required to frequently perform a set of document tasks. For example, to post a document on the corporate website, the company might require users to follow guidelines on how to secure the document, which metadata to include, and how to optimize the file size. By automating these tasks, the company not only gains employee productivity but also ensures consistency and adherence to the policies that it has set.

IT's next step
Work with business owners to identify productivity gaps in your organization. Are the current office productivity applications meeting the needs of users, or are they going outside to find additional tools? How much money and time can be saved by consolidating your IT environment to the right productivity applications?

The bottom line

To help an organization meet its business objectives, IT must be proactive in increasing the efficiency of document collaboration and enabling more dynamic methods of communication. Knowledge workers are already seeking these solutions and, in some cases, are bringing these tools into the environment, creating more complexity for IT. To maximize success, IT needs to deliver document collaboration and exchange solutions that are broad enough to scale across a wide variety of knowledge worker needs, can cost-effectively scale across and beyond the organization, offer required document controls for maintaining security and privacy, and can flexibly span languages, computing platforms, and computer skills.

Adobe Information Request

To speak with an Adobe representative and learn more about Adobe solutions for document collaboration and exchange, please complete and submit the form below.

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First name *

Last name *

Job title *

Organization name *

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E-mail *

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ORGANIZATION INFORMATION

Which best describes your industry? *

What best describes your primary occupation or job function? *

How many employees in your company will be using this product? *

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Questions or comments

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