



The Ultimate Business Office

Introduction

The pace of change in today's rapidly changing global economy moves faster every day. The demands on Government agencies to improve responsiveness increase. Large and small organizations are constantly challenged to improve efficiency and reduce costs. Change, demand and challenges build stresses into any management system. Budget cuts keep coming. New ways to do more with less seem more elusive. Whether to improve margins, gain competitive advantage or just to gain control of the explosive growth in files and communications, successful companies and agencies are looking for an edge.

More businesses and offices are leveraging the advantages offered by integrated, collaborative business management and control software. These tools use advanced productivity features to revolutionize your file and communication management. In addition to document management, they offer collaboration support, email-to-process mapping, dynamic process creation and intellectual property optimization.

Automated workflow visualization significantly reduces risk in projects and everyday activities. Integrated knowledge management preserves critical information assets. All of this is deployed through a portal to support virtual teams and work anywhere. Workflow speeds up and costs go down.

Tools and technology of this type have been evolving with the maturing of Web 2.0 (interactive web portals). Case studies and financial analyses of these platforms show a ROI of over 100% and payback periods of less than one year after implementation. With planned deployment, employee and client satisfaction increases.

A McKinsey & Company survey of 3200 companies found that two-thirds were using Web 2.0 technology in their organizations, and that they plan to increase future investment in the technology. A majority of these companies report measurable business benefits as a result.

This paper will discuss some of the business office problems of growing organizations and methods to address them with the integrated business software. It will also give important considerations for deployment and information on the solutions found in CYIPRO.

Business Pain Points

The first steps in making technology decisions are to identify the business problems which need solving, then whether the tool can relieve or eliminate the problems. The following may sound familiar.

Business communications are growing explosively. Emails, manuals, templates, proposals and processes are produced daily by employees. Most wind up in someone's inbox, a team room or in a file share. Employees repeatedly search for a file or an email during every work day. If these efforts fail, employees may just re-create the document.

Traditional meetings are no longer effective. Face to face meetings are expensive, particularly if travel is required. Video and teleconferencing have reduced meeting time and costs associated with dispersed teams, but still have many limitations in innovative thinking, preserving co-authored documents and tracking actions.

Managers, from the CEO to the Team Lead, depend on weekly or monthly static status reports, with no visibility between reports on what is ahead of schedule and what is about to go critical. Management needs immediate, centralized interactive access to 'who does what, when it is due and what the status is'. Overdue items are not noticed until they reach red status. Proactive risk management across a large organization is virtually impossible.

Employees constantly reinvent the wheel and repeat mistakes from the past. Knowledge management, intellectual property capture and lessons learned continue to challenge the best managers.

- Critical information and skills are lost when employees leave.
- On boarding of new employees needs to be streamlined.
- Finding the employee with the expertise you need is difficult and time-consuming.

Business processes change rapidly, driven by new requirements, including the rapid release of new policies and compliance standards. Coding these into the workflow of legacy tools can be time-consuming and may have to wait for available IT resources.

Lastly, the office tools deployed to manage these headaches frequently come from multiple vendors and don't talk to each other. Those agencies and departments which will succeed need one tool which integrates the critical function and makes them easy to use, anywhere.

In one case study, the Juvenile Division of the District Attorney's was challenged to cut costs and improve efficiency, a common call for many local, state and federal government offices. They identified their case file management system as ripe for improvement,

The four courtrooms each heard 25 to 30 calendar items each day - 25,000 a year. Most required a ten page report with was printed four times and distributed. This generated one million pages a year.

All these reports had to be created, printed and distributed - taking a lot of time and effort. Any changes required reprints and redistribution.

Managing the stack of printed files was physically challenging and inefficient. Away-from-the-office reviews by attorneys and others required carrying a heavy load of paper.

The office decided to migrate to an e-document system. They replaced the legacy system with a very secure, indexed digital library of e-case files accessible to the attorneys and court employees.

The system offered electronic briefcases which pulls the files the attorney or probation officer need at one time. Paper files are not used or brought to court. This system is estimated to save over 200% of the original investment in the first year, for an ROI of over 100%.

(Microsoft Case Studies, 2012)

Business Solutions

*In the early 1900's, Frederick Taylor and Henry Gantt recognized that
"business should be run like projects"*

Document Management

Document management software (DMS) in its simplest form is designed to store and track electronic files or records, which could be documents, scanned images, graphics, emails, or any of the other records needed by the business. Advanced versions of this tool offer many other advantages.

- The most efficient entry into document management is **E2P (email to project capture)**. The E2P feature extracts email and attachments from an individual's inbox and places them into the project repository.
- **A hierarchical file structure** which maps to the organizational chart stores documents, pictures, videos and all digital files. This aligns the document and action management with your business model. Processes can be readily mapped to this architecture.
- Each file is stored with **metadata**, for example, the date the document was changed and the last person to change it. This identifies its history and enables powerful new search capabilities.
- Files are also tagged with **vocabulary terms**, key words or other tags to improve the speed and accuracy of retrieval of unstructured data & information
- The platform can **quickly locate information wherever it is stored** in the system, using vocabulary terms (project, division, task, technical area, or other key words) and full text search.
- **Versioning** provides certainty that you can find the most current document. It also lets you return to earlier versions when needed.
- **Secure access and distribution** is enabled. In a regulatory environment, the original master copy and format is protected. Those who need to retrieve the file can access it from wherever they are working. Each file is protected from unauthorized access.
- **Storage management** defines how long the file is retained, when it is archived and deleted.
- The DMS can also support the **forwarding and tracking** of a file or email.

This technology presents an enormous opportunity for increased productivity managing documents. Employees continuously deal with finding the information they need. In offices where hard copy is used, handling paper adds another layer of cost and effort.

Collaboration

Successful businesses and agencies are realizing the benefits of software which encourages and facilitates collaboration to accelerate problem solving and track results.

- For many departments and divisions, employees scattered across geographically dispersed branches, home offices, client sites or points in between, can **communicate, share screens or documents and track the resulting actions.**
- **E2P** enables joint problem solving almost as fast as a single person could act, but with the insight of the entire team. This feature allows project team members to **email task and information** directly from any device into the project repository.
- **Video and audio conferencing can be integrated** to maximize the idea sharing possible from 'getting everyone together'.
- Collaborative software eliminates the need for many meetings, such as status calls, through **shared real-time status reporting and tracking.**
- **Custom Calendar views** allow each person to see details of what is assigned to them, details they've assigned out, details that are High priority and All details. A **reminder function** increases its usefulness.
- Microblogging is the Twitter of collaborative software. Most commonly used is **Instant Messaging.** These messages are tracked and stored also.

Knowledge Management

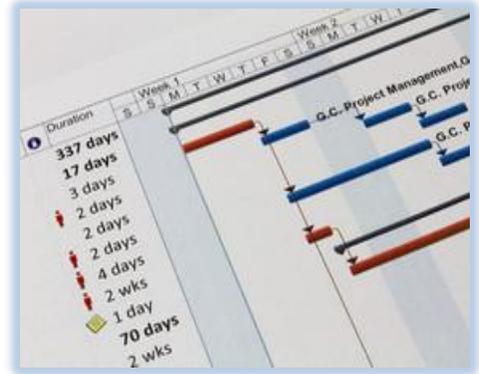
Intellectual property capture and lessons learned continue to challenge the best administrators. Management focus and tool support are both required. Standard forms, processes and tools improve outcomes and reduce costs over ad hoc efforts.

- **Tacit knowledge** refers to the type of knowledge which is difficult to write down and communicate -- learned knowledge, experience, or most often, the intellectual capital which is just not documented. This learned and developed information is a very valuable and critical business asset.
- The best **enterprise knowledge management tools** make this capture easier by integrating KM into everyday work processes. The **E2P** feature extracts email and attachments from an individual's inbox and places them into the project repository.
- As with all company assets, this **explicit, or documented, knowledge must be secured** so that only the appropriate personnel are allowed access.
- Knowledge management must include **Subject Matter Expert (SME) identification**, to help find the person or team you need to help you on a difficult problem. A sophisticated platform will tie these SME's to the knowledge documents managed.
- **Best of breed work products** created by an employee or team are preserved for **reuse and revision.**
- Those who must take over for employees who are out sick, have moved to other jobs or left the company find the handover much easier by **access to job role and reference documents.** This is the basis of knowledge management -- capturing the SME's knowledge before it walks out the door.
- New employees can be on-boarded and become productive much faster with access to the information they need.

Project and Activity Tracking

Many business management and control applications or platforms offer a **centralized command and control center** to manage workflow from anywhere.

- **Assignments can be viewed and changed** as to who does what, when it is due, dependencies and associated documents.
- **Projects have owners (managers)** and they are responsible for getting the project to completion. Tasks make up the steps necessary to complete the projects and have owners as well. This **"ownership"** enables **"total accountability"** and more of a collaborative environment to work.
- **Real time dashboards** provide a structure to view real-time information, status and update activity for multiple teams, projects, employees and tasks.
- An extremely effective method is to build a **hierarchy to map your organizational chart**.
- **Automated visual reports** help staff stay on track and can be customized.
- **Alerts** can be set up to flag overdue actions which might not be noticed until they reach red status. Many such reports use the familiar formats of **Gantt chart** and **Red-Amber-Green (RAG)** coding.
- Actions from meetings are added to the Gantt charts. This type of cutting edge reporting **reduces risk** across the enterprise in identifying delays and problems early.
- For growing organizations, **scalability** is critical. Assume 5 divisions with 10 work teams. If you have 10 projects under each team, with 10 tasks each, upper level management must track 5,000 tasks. And they will have to track more next year. **Visual, real-time tools with drill-down capability** can make this manageable.
- Project based systems allow for previously **completed projects** to be **captured and stored for reuse**. This approach prevents recreating the wheel for every project, which is a huge painful process for any size business.



Dynamic Business Process support

Successful businesses utilize documented, **standard, reliable business processes**.

Integrating these into the integrated business office platform can provide significant productivity gains and ensure predictable results.

- The newer business management tools allow these processes to be both **defined and deployed at the enterprise and business unit level**, avoiding the delays and cost of waiting for IT to implement them.
- **Processes are built by the owners and SME's**, to ensure any work in this category is being done the right way. The SME also gives approximate time for each task, as well as dependencies and tools.
- Each **vocabulary term is mapped to one or more SME's**.

- This user friendly business process support allows the departments to **respond quickly to changes in requirements** against the process (e.g. changes to policies and compliance standards). It also allows them to **model improved processes quickly**. As staff uses the process, they can make updates, keeping the reference up-to-date.
- The document management and collaboration features of these platforms support **building a Process Library** which is indexed to a department, a job role or a particular task. This library can be searched and accessed enterprise-wide for common processes and procedures.
- **Workflow can be enabled**. A process can also include automation of routing and approvals, so entry of an action kicks off the tracking until it is complete. For example, a vacation request may have rules as to whom it is sent, approvals needed and response times. **Alerts** call out those which are at risk of not completing successfully and on time.

Mobile Support

One of the most important features of the business control and management platforms is a **unified portal** for workers which allows interaction with the core business **from phones, tablets, computers or other devices with Internet access**. This software allows them to manage their work and time better.

- **The unified portal** strategy means that there is one entry point for all the permitted functions listed above. The access supports interactive use – the employee can view, retrieve, edit and save the features he or she needs.
- **Cloud computing** also protects you against loss of your information in case of natural or manmade **disasters**. **Business continuity** lets you get back up and running quickly.
- **Security of the organizational assets is improved**. The system is built with the needed rules and policies to allow easy access to those who need it and block those who aren't authorized. Systems are built to provide the security required by the business or the department.
- This is an opportunity to **sweep up the unsecured assets of the company** and put them under the **proper control**. Valuable intellectual property may be sitting on hard drives or be printed and lying on desks. Competitive information may be in a status report circulated by email.

The 2012 McKinsey survey reported the following for organizations deploying interactive web technologies:

- *77% report faster knowledge access;*
- *60% see reduced costs for communication;*
- *52 % report faster identification and access to Subject Matter Experts (SME's);*
- *44 % reduction in travel expense;*
- *41% are experiencing improved employee satisfaction.*

They also reported significant gains in reducing operational costs and time to market, as well as improved innovation in new products and increased revenue.

What's in it for your organization?

So far, the discussion has centered on problems to be solved and potential solutions through the software. What does it take to implement this type of platform and what are the benefits?

- Deploying an integrated enterprise solution can **reduce the number of software vendors and licenses**.
 - The leading systems can be **delivered through the cloud or deployed on in-house servers and networks**. The cloud solution offers advantages in **reduction of server and network hardware**.
 - If an in-house hardware solution is selected, existing **infrastructure is better utilized**. When the files are managed to eliminate duplication and provide archiving, **storage requirements are reduced**.
 - Integration of all the platform features allows the business to build a **responsive, fast, agile system**, replacing software packages which don't talk to each other.
 - **Training costs are lower** for these platforms. They are designed to be managed by the user, and any training necessary is just for the functions of the part of the system they will use.
 - As in any such transition to a technology solution, first refining or **deploying standards provides greater gains**. The deployment and the standards **work can be done in phases**, to **spread out the investment and minimize impact to the business**.
 - In many studies **ROI has been reported at over 100% within a one year period** after deployment of integrated, collaborative business management platforms. As the new technology succeeds in one area, the gains are cumulative in the out years and other processes can be included.
 - The leading packages are **flexible and scalable** to address expansion to different business areas and to larger numbers of

employees, documents and processes.

CYIPRO – Your Business Office in the Cloud

CYIOS Corporation is a leading Department of Defense (DoD) contractor providing cutting-edge, innovative solutions since 1994 in three distinct areas: systems integration; Web and database development; and business process management and improvement.

CYIOS built America's Army Online, the first Army Knowledge Management solution that was developed to become the core for **Army Knowledge Online (AKO)**, the U.S. Army's main intranet serving over 1.8 million registered users.

CYIOS continued innovating in knowledge management with the development of **CYIPRO**, a virtual office solution for collaboration, accountability, knowledge management and virtual work spaces that features document management and versioning, project and task management, e-mail encryption, full-text search, timesheets, meetings, and reports.

CYIPRO offers three distinct advantages over a simple cloud computing solution. The platform captures the knowledge in the system and makes it available, provides an interactive command and control center and enables local and remote teams to communicate and collaborate and create most effectively in one project centric system.

- **CYIPRO's exclusive Email to Project (E2P) tool** – takes emails and attachments, and transforms them into team discussions within a project.
- Store it and forget it as **CYIPRO's powerful notification system** will find you via, text, email or your dashboard.
- Create an **enterprise 'vocabulary'** to tag, organize and categorize your projects/tasks and files.
- Start building your **process library** by capturing and automating the most critical and common used workflows.
- Use the **dashboard and alerts** to assess programs and projects in such a way that the employee can respond quickly and proactively.
- Leverage your best assets by creating an **SME mapping** to skills, processes, projects and files. Find help fast.
- Build the effectiveness of your operations with a flexible, scalable platform designed by your business units and **modeled to the way your employees work**.
- Get answers to your questions fast with the **Help** functions. **Product Help** supports your **CYIPRO** application. **Technical Support** tracks user problems, suggestions and errors/bugs.
- Instead of sending an email requesting information or assistance that could be lost or ignored, an employee can submit a **Staff Request**. The request is tracked until completion in **CYIPRO** as any other task is, giving total accountability to all involved.

Contact **CYIPRO** today to take your group to the cutting edge of innovation and productivity.

For more information on **CYIOS** Corporation, go to www.cyios.com or email kmsolutions@cyios.com. For more information on **CYIPRO**, go to <http://cyipro.com/>

Reference:

Bughin, Jacques and Chui, Michael. 2010. The rise of the networked enterprise: Web 2.0 finds its payday. McKinsey & Company.