Introduction

Organizations of all sizes and every industry depend on information to fuel everyday operations. Choose any important business process and you will find that information drives the workflow. The effectiveness of that activity is a direct result of how well information is managed, and by how well technologies and people work together with information.

There are many challenges to managing information, but there is an abundance of opportunities to leverage information in ways that inspire innovation. Now, more than ever, organizations must adopt new approaches and strategies focused on bolstering “Organizational Intelligence.”

What is Organizational Intelligence?

Organizational Intelligence is the ability to use information, technology, and people in ways that improves an organizations' performance. This is essential for organizations to compete as demands for new digitally-enabled ways of working disrupt every aspect of doing business today; creating new markets and new competitors that were unforeseen just a few years ago.

The essence of Organizational Intelligence is being smart about how the organization uses information. In other words: If you’re not using information, systems, and people intelligently, it’s unlikely that you’re doing much to improve performance and innovate.
Connected Thinking

Organizational Intelligence is about making a connection between knowledge and people. The goal is to create a workforce of “connected thinkers”, who can tap into information and access it at the point of need so that the organization becomes, quite literally, more intelligent in the way it operates across information, process, and people.

Drivers for Transformation

According to AIIM research, 79% of organizations realize that they must transform in order to survive. That is hard to do without incorporating intelligent approaches to information management and a thoughtful understanding of the linkage and impact to organizational performance.

The good news is that advancements in capabilities like Artificial Intelligence, business process automation, and collaborative systems are already enabling businesses to out-maneuver and out-perform their competition. Our members indicate that the following are the top drivers for transformation: 

- Increased efficiency and productivity (56%)
- Greater innovation and problem solving (45%)
- Better levels of customer service (38%)
- Document and knowledge management (64%)
- Personal productivity and mobile enablement (48%)
- Team collaboration and community platform (40%)

And the top technologies targeted for transformation are:

- Document and knowledge management (64%)
- Personal productivity and mobile enablement (48%)
- Team collaboration and community platform (40%)

Organizational Intelligence is built with tools that enable key business processes to be more effective and innovative by virtue of improving the interaction between information, technology, and people.
What Keeps Organizations from Being Intelligent?

Information is hard to find – One of the biggest roadblocks to building Organizational Intelligence is that information continues to be hard to find. It is not uncommon for organizations to have multiple data repositories, line of business systems, and records archives located across the organization; all housing critical information that is often isolated in discrete silos of process, application, and ownership. Without a holistic view, it can be difficult, if not impossible to understand exactly what information you have, where it is stored, and what it means. AIIM research tells us that users feel that the chaos needs to be tackled at its origin; 85% see failure to digitize, standardize, and automate business inputs as a key transformation bottleneck.²

Increasing competitive pressure – Organizations must be more agile and intelligent in order to keep pace with their competition. According to Forrester,³ digital technology is drastically altering the balance of power between customers and companies. While customers gain the power of information and choice, digital technology dramatically improves the economics of business. These economics are the primary drivers of digital transformation for many businesses. As a result, executives and technologists feel the very real demand to apply information, technology, and people in ways that innovate, compete, and grow. Every industry has this unique digital transformation challenge/opportunity.

Changing workforce demographic – By 2030, the U.S. Census Bureau projects that one in every five U.S. residents will be older than age 65. This means that many experienced workers will exit the workforce in the next ten years. Older, experienced workers will be replaced by the rising population of Millennials and Generation Z workers. Without a strategic approach to capture the uncodified expertise of these seasoned workers, organizations risk losing a body of intelligence that may be essential in the future. At the same time, younger employees expect the kind of modern, digitally-enabled tools and capabilities they need to be productive. A modern work environment – with agile and intelligent tools – is a top differentiator when recruiting and retaining top talent.⁴
How Can Organizations Be More Intelligent?

**Content Integration** – It can be difficult to leverage information as an important organizational asset when you are unclear on exactly what information you have, where it is all located, and what risks and opportunities it presents to the organization. Content integration, therefore, becomes a huge differentiating factor when it comes to advancing Organizational Intelligence. A great deal of tactical and strategic advantage is gained by integrating access to information across multiple systems so that end users and decision-makers have a single view from which to analyze, plan, and execute process improvements and product/service innovations.

**Strategic Classification** – Defining a strategic approach to tagging and metadata is essential to cultivate Organizational Intelligence. This requires addressing both people and technology. People and process must be attuned to the critical need for consistent and accurate tagging of information, and technology and systems must be easy to use while driving the process in ways that ensure the correct metadata is achieved. From there, the organization is enabled to perform any number of precision searches that result in things like better service and improved workflow while bringing about better business intelligence and strategic decision-making.

**Understand Process Bottlenecks** – All of these Organizational Intelligence techniques are best applied using a process analysis approach that examines each key activity with an eye to uncover gaps in performance and bottlenecks in the workflow. It is critical to involve IT along with cross-functional teams consisting of business unit personnel and other stakeholders. In this way, your efforts not only address the technological changes that may need to happen, but also the business-focused organizational aspects essential for improvement.

**Examine New Tech Opportunities** – Innovations are moving so quickly that it is easy to get caught behind the curve. For example, cloud-based approaches are the new infrastructure of business today, and developments in things like Artificial Intelligence and data analytics have opened up new opportunities for process improvement and innovation that were simply not possible a few years ago. To help make adoption easier and more cost-effective, developers are working hard to provide process-focused solutions tailored for common business activities in areas like finance, human resources, and onboarding.
How are these techniques applied in the real world to promote Organizational Intelligence?

One good example is the story of Mott MacDonald, a global engineering, management, and development consulting firm headquartered in London. Every day, Mott MacDonald must manage some of the world’s largest, complex, and high-profile engineering projects. As a result, the scope and implication of Organizational Intelligence are formidable.

The firm relies on the knowledge and expertise of its 16,000 employees. To help them share and collaborate more easily, the company has adopted a number of new approaches, including the use of Project Cortex, a new service in Microsoft 365.

Project Cortex created what they call a “knowledge network” that automatically connects and organizes the organization’s content into topics and generates wiki-like topic pages. The information is provided in familiar tools like Office, Outlook, and Microsoft Teams. When employees see an unfamiliar acronym or project in email or chat, for example, they simply hover on the word which pops out a topic card with a description and related experts, documents, and videos. A click on the card will call up a topic page, curated by AI and organizational experts, with richer information like diagrams that link related and adjacent topics.

This fluent linkage between information and people has made a difference. “Connected thinking is one of the core values at Mott MacDonald,” says Chris McNulty, Director of Product Marketing at Microsoft. “And the integration works at two levels. First with the ability to capture and deliver knowledge to individuals in the flow of their work, and then to make sure that their own expertise is collected and shared to improve everyone’s shared knowledge through the organization.”

As a result, Mott MacDonald is building stronger connections across the company’s large, global communities and fostering Organizational Intelligence in ways that help employees create solutions to many complex challenges, build expertise, and save time, all while enhancing service to customers.
Moving Forward

Organizational Intelligence is a new paradigm that is based on a thoughtful approach to how information, technology, and people must work together to bring about improved operational performance. Any number of solutions and techniques can apply, but the overarching approach is focused not only on technology, but also how the capabilities and innovations make a difference in the way business is done every day. Look for providers and partners with the right mix of vision, capability, and expertise to make the most of your efforts.

Notes:


What’s Next?

Every organization in the world is on, or should be on, a Digital Transformation journey. How effectively you navigate this journey relies on how adept your organization is at combating the rising tide of information chaos. This requires new strategies and skills that extend beyond traditional ECM. We call this modern approach Intelligent Information Management.

This course explores how your role as an information professional is critical to accelerating business activities, enriching customer experiences, and improving operational agility.

You will learn how to:

- Create and capture information
- Extract intelligence from information
- Digitalize information-intensive processes
- Automate governance and compliance
- Implement an information management solution

The Foundations of Intelligent Information Management Workshop was designed as a primer for the Certified Information Professional exam. For attending, you will receive the CIP Study Guide and a voucher for one free CIP exam registration.
About this eBook

As the non-profit association dedicated to nurturing, growing and supporting the information management community, AIIM is proud to provide this research at no charge to our members. In this way, the entire community can leverage the education, thought leadership and direction provided by our work. We would like these research findings to be as widely distributed as possible.

Feel free to use individual elements of this research in presentations and publications with the attribution — © AIIM 2020, www.aiim.org”. Permission is not given for other aggregators to host this report on their own website.

Rather than redistribute a copy of this report to your colleagues or clients, we would prefer that you direct them to www.aiim.org/research for a download of their own.

Our ability to deliver such high-quality research is partially made possible by underwriters, without whom we would have to use a paid subscription model. For that, we hope you will join us in thanking our underwriter:

One Microsoft Way
Redmond, WA 98052
United States

About Microsoft

Microsoft enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.

Microsoft 365 is the world’s productivity cloud helping your team perform at its best, whether in the office, working from home, at a client site, or on the road.

To learn more visit: www.microsoft.com/en-us/microsoft-365/
Here at AIIM, we believe that information is your most important asset and we want to teach you the skills to manage it. We’ve felt this way since 1943, back when this community was founded.

Sure, the technology has come a long way since then and the variety of information we’re managing has changed a lot, but one tenet has remained constant. We’ve always focused on the intersection of people, processes, and information. We help organizations put information to work.

AIIM is a non-profit organization that provides independent research, training, and certification for information professionals.

© 2020

AIIM Headquarters
8403 Colesville Road, Suite 1100
Silver Spring, MD 20910, USA
+1 301 587 8202
www.aiim.org

AIIM Europe
Office 1, Broomhall Business Centre,
Worcester, WR5 2NT, UK
www.aiim.org