Issue 22

Future of Enterprise Content Management

Content Services for a truly Digital Content Management Strategy

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From the MD’s Desk

Dear Readers,

I am happy to share with you the latest edition of our research-based industry newsletter on the future of Enterprise Content Management.

Digital transformation is upon us and businesses are dealing with the challenges of customer delight, organizational change and business speed, all at the same time. As the world gets more digitalized, content continues to be generated, used, stored, retrieved and archived at a lightening pace. Billions of documents, terabytes of transactions, and petabytes of storage are at the heart of the transformation of any enterprise. A wisely chosen Enterprise Content Management (ECM) platform can make or break your digital transformation strategy.

This newsletter provides insights into the core capabilities of a holistic ECM platform and presents a 15 point checklist to facilitate enterprises devise a truly digital content management strategy. It outlines the future of ECM and the perspectives as shared by leading analysts and thought leaders. The newsletter also describes how a leading insurance company with over 360 million customers manages content with Newgen’s platform. It also features a premium research report from Gartner- What you need to know about Content Services Platforms.

Newgen OmniDocs ECM platform enables digital transformation for organizations. It allows end-to-end management of enterprise content and enables users to build customer-centric apps and drive context in content. The platform has been widely recognized by industry leaders and research firms.

I hope you will enjoy reading the newsletter and find this useful.

Best Regards,

Diwakar Nigam
MD Newgen Software
Death of Enterprise Content Management (ECM) or Birth of Content Services?

This debate has taken the ECM industry by storm and has left technology decision makers in ambiguity. Some say that it is the era of content services and others suggest that ECM would be reborn as Information Management. And, amidst all the chaos, a torrent of information is being generated across social, mobile and cloud technologies, which needs to be managed. It’s time to unravel the mystery and address the elephant in the room.

ECM- The Known and the Hidden

Enterprise Content Management (ECM) systems have been around for quite some time now. They have enabled businesses across industries to manage content and serve customers better. It evolved from Document Management Systems (DMS), which primarily digitized, stored and managed documents through imaging, storage and document and record management technologies.

With ECM in place, businesses automated their complete content lifecycle from content generation, storage, archival to its retrieval. To address the needs of the multi-channel digital content, ECM further advanced by leveraging cloud, mobility, analytics, and social technologies. By extending business applications on cloud, on-premise or hybrid environments, it has enabled users to easily access information through their mobile devices.
Newgen is the only company globally to be included in the four latest Magic Quadrants for ECM, BPM-Platform-Based CMFs, iBPMs and CCM*

Other than managing content, ECM stands to offer a lot:

- **Secured Information** – ECM allows management and security of various content types, such as documents, forms and electronic files. It facilitates organizations with a centralized repository for archiving data, thereby mitigating the risk of losing information from physical drives. It further encrypts data transfer from capture to archival and offers rights-based access to users, eliminating data leakage.

- **Better Regulatory Compliance** – The system underpins the compliance issue by empowering companies to control and monitor the information through detailed audit logs and reports. It conforms with various regulations and policies concerning long-term archival of information and records.

- **Improved Customer Service** – With access to the right information at the right time, users can drive contextual customer interactions. Leveraging ECM, businesses can manage content across various channels and social media, resulting in enhanced customer experience.

- **Enhanced Operational Efficiency** – Reduce knowledge workers’ time spent on information search and retrieval. With proper indexing via ECM, any information is just a click away. Eliminate administrative costs associated with storing and managing documents and physical records.

**ECM- Dead or Not?**

Analysts predict the future of a technology segment on the basis of following parameters:

- **Market Definition** – how software affects the market amidst new technologies and products

- **Software Vendors** – how vendors are mapped in the market as per their technological and business capabilities

- **Technology Capabilities** – how technology solves evolving customer needs

Based on the above underlying fundamentals, different analyst firms are predicting the future of ECM technology.

In 2016, Gartner redefined ECM market as Content Services – a strategic concept covering Content Service Applications, Platforms and Components. However, other analysts suggest that a new term would be proposed, which will encompass both data and content strategy. And, another independent research firm has bifurcated the ECM market into two broad categories.

Different analysts are voicing different opinions. However, there are a few converging points:

- **Business-centric apps are gaining value vis-à-vis one-size-fits-all software.** These apps can be deployed rapidly on modern architectures such as microservices (as against deployed

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Magic Quadrant for Customer Communications Management Software, 26 January 2017, G00298788
Magic Quadrant for Intelligent Business Process Management Suites, 18 August 2016, G00276892
Magic Quadrant for BPM-Platform-Based Case Management Frameworks, 24 October 2016, G00276724
Magic Quadrant for Enterprise Content Management, 31 October 2016, G00293563
“The transformation from ECM to content services denotes an important conceptual shift away from the “management” of content and too much focus on the repository as the solution. Redefining the market as content services recognizes that it is no longer strictly about the storage of content for the enterprise, but rather about the consideration of how content is used by individuals and teams – internally and externally – to create, collaborate, share, transform, and leverage that content in business processes and to gain insight. This transformation will be a multiyear evolution in many organizations, and reflects a change in requirements from buyers, affecting several markets.”

*Gartner, Inc.*

as a monolithic packaged software). This provides flexibility for business to price based on the specific use case rather than standard application price points.

- **Contemporary capabilities are expected to be added** by content management technology providers. A few examples of such capabilities are higher level of process automation (through bots) and contextual content & information (leveraging analytics and machine learning).

- **ECM is about the “what” and not the “where” of content.** It is not about control over a central repository, but about enabling users to access content across distributed repositories in an organization. Employees and stakeholders demand flexibility to collaborate across their business functions.

- **ECM should be extensible enough to be easily and instantly connected and/or embedded** within 3rd party apps and tools over multiple devices and communication channels. This should be done over time for organizations to be able to create their ‘business specific content applications’ and solve their real business problems.

**Long live the Customer!**

It’s clear from the above points of convergence that all analysts, vendors and content technology strategists acknowledge that ECM technology is on an evolutionary path, driven by fast-changing market and business dynamics. However, the manner in which it evolves (and combines with contemporary technological capabilities of value) would be a function of business needs, which are eventually driven by customers.

Enterprises lay out their content or information strategy based on how they want to connect their processes, systems, people and things. Content Management technology will fit into the broader business technology stack as – Content Services Platform, Content Services Applications, and Content Services Components, along with directly or indirectly associated Applications, Systems and Tools. This, however, will be driven by customer-centric content and information strategy.

Whether ECM is Dead or Not, Long live the Customer!

*Source: Newgen*

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1Gartner Inc., Reinventing ECM: Introducing Content Services Platforms and Applications, 5 December 2016 ID: G00319354
Emergence of Content Services

Organizations traditionally relied on Enterprise Content Management (ECM) for their content lifecycle management. And, time and again, ECM fulfilled the promise by managing the content end-to-end, right from creation to disposition. However, times are changing. Today, the business success depends on how agile an organization is in responding to customers, catering to their needs, and thereby exceeding their expectations. This requires organizations to go beyond the centralized, monolithic approach of content management and rethink their digital content strategy.

Change Drivers of Content Management Strategy

Content plays a vital role in this changing business landscape. Businesses can drive success with access to the right information at the right time by empowering knowledge workers to drive contextual customer interactions and make smarter decisions with deeper insights. In order to leverage content efficiently, it is important for organizations to acknowledge the five key drivers that are challenging them to redefine their content management strategy:

1. **Digital customers demand anytime – anywhere services.** Digital customers demand instant results out of any engagement, which could be initiated anywhere, across any device and at any given time. Customers look for unified cross-channel experiences, where businesses offer flexibility to engage with them- with any content in any preferred format (message, video, image, document, form, picture, tweet, post, comment) across any mix of channels (social media, phone, chat, email, fax, postal, face-to-face) and over any device.
2. **Employees expect “Boundaryless Access” to content.** This approach differs drastically from the traditional organizational view of “Controlled Access” to content. To efficiently service customers, the digital workforce (including employees, vendors, partners, etc.) expects mobility across multiple devices, networks & platforms and collaboration over a secure work environment. The challenge is to implement organizational content strategy around digital work style of employees while ensuring security.

3. **Organizations need flexibility.** Today, businesses are more exposed to business/market risk and opportunities than ever before. Organizations should be able to adapt to changes in real-time across the growing and declining business phases. This requires enterprises to build and procure technologies that provide them elasticity to upscale or downscale, extend applications, and tap innovative strategies or technologies as and when they want. Organizations need to have scalable applications that can help them quickly embrace the changing business demands.

4. **Business operations are not in silos anymore.** Organizations must involve workers across different functions and processes to leverage content for planned outcomes. Various systems that are used by different teams and departments should be able to collaborate so that there is a seamless information flow, maintaining concurrency of data updates and triggering respective actions across various team members. Employees should be able to easily collaborate with their team members so that the work gets instantly done.

5. **Compliance and Governance are fundamental needs.** With information access and control in the hands of users, it becomes more challenging for organizations to control and secure information without limiting the user experience. Governance and Regulatory Compliance need to be taken care of by content management technology to mitigate any business risks posed by the users.

### Enterprise Content Management powered by Content Services

Considering the above drivers, businesses need to rethink their content strategy to address the current challenges and meet the future needs. Today, a digital business model comprises employees, customers and other external stakeholders. This requires enterprise content to seamlessly flow across internal and external stakeholders. ECM needs to evolve to enable digital business heads to manage, use and re-use content as per their business needs.

The answer to these evolving needs is Content Services. **Content Services can be the fundamental building blocks of the next generation ECM platform.** ECM platforms powered by content services can utilize a microservices architecture to create rich consumerized ECM applications. It moves away from the monolithic, centralized approach and offers flexibility and extensive integration capabilities, enabling easy integration with third-party applications and tools.

### How does an ECM platform powered by content services work?

Let’s take an example of smartphones to understand how an ECM platform powered by content services works. A smart mobile phone has several mobile apps. And, all the apps work independent of each other and can be updated without disturbing other apps or the phone itself. ECM powered by content services works on a similar concept. ECM platform utilizes content services provided by single or

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*Newgen is the only company globally to be included in the four latest Magic Quadrants for ECM, BPM-Platform-Based CMFs, iBPMs and CCM*
multiple applications, repositories, ECM tools or components. Content can be further tapped by users, apps, and other applications such as ERP by using the published content services. The platform renders flexibility to business users by doing away with the one-size-fits-all packaged ECM software approach.

**A Holistic ECM Platform**

To efficiently use and consume content, businesses need to leverage content services and enable organizations to build customer-centric business applications, which drive context in content throughout a customer transaction or a customer lifecycle. In order to accomplish that, an ECM platform should demonstrate all the necessary functionalities from content capture, content processing & storage, management of content-centric processes, delivery of information to archival of documents and records. And, further, all this functionality needs to be available through loosely-coupled content services that can be consumed from anywhere without losing the necessary context.

According to Gartner’s market definition, “a content services platform must provide a baseline set of common services and microservices focused on essential administrative, security and functional capabilities that support generalized CM and processing use cases”¹ *(as seen in the below figure).* To devise the right content strategy, businesses need to identify specific business use cases and consider the operational and functional aspects of their business, thereby leveraging the right set of services from the content services platform.

“ECM is a set of services and microservices, embodied either as an integrated product suite or as separate applications that share common APIs and repositories, to exploit diverse content types and serve multiple constituencies and numerous use cases across an organization.”¹

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¹Gartner Inc., Content Management for the Digital Era: Rethinking Strategies Beyond 2016, 16 September 2016 ID: G00302851
²Gartner Inc., What You Need to Know About Content Services Platforms, G00325087, 3 April 2017
Newgen is the only company globally to be included in the four latest Magic Quadrants for ECM, BPM-Platform-Based CMFs, iBPMs and CCM*

Figure 5. Content Services Platform Baseline Services

<table>
<thead>
<tr>
<th>ADMINISTRATION</th>
<th>REPORTING AND ANALYTICS</th>
<th>CONTENT SECURITY</th>
<th>DEPLOYMENT, DELIVERY AND PUBLISHING</th>
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<tbody>
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<td>• Audit Administration</td>
<td>• Content Analytics</td>
<td>• Access Control</td>
<td>• Multichannel Publishing</td>
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<td>• Device Administration</td>
<td>• Process Analytics</td>
<td>• Audit</td>
<td>• Publication Rollback</td>
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<td>• Key Management</td>
<td>• Reporting</td>
<td>• Automated Content Cleansing</td>
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<td>• Policy Administration</td>
<td>• Social Analytics</td>
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<td>• Natural-Language Generation</td>
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<td>• File Sharing</td>
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<td>• File Synchronization</td>
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CMIS = content management interoperability services; IM = instant messaging; LOB = line of business; ML = machine learning; UCC = unified communications and collaboration

Source: Gartner (April 2017)
Customer centricity is the driving force for businesses today. This creates an incessant pressure on businesses to understand customer requirements, track business risks and accordingly create a content strategy. The key to digital content strategy is to be able to drive context through business content and processes. By selecting the right ECM technology, organizations can build customer-centric business apps and tie in the content to build context throughout the customer transaction.

**Core Capabilities of ECM to look out for**

In order to meet the needs of digital customers, empower business users, and facilitate a ‘Boundary-less’ organization, it is important for enterprises to minutely consider each and every ECM capability.

Here’s a quick run-down of the 15 criteria against which organizations should evaluate the ECM technology for rich content services.

**To meet the needs of Digital Customers**

1. **Multi-channel content management for digital customers.** Customers have developed an intrinsic need for products and services that provide “instant” gratification. They communicate with organizations over their preferred engagement channels, share information in multiple formats and demand engagement in real-time across all transactions. Organizations must understand the evolving expectations of their customers, map their journey across sales lifecycle,
Newgen is the only company globally to be included in the four latest Magic Quadrants for ECM, BPM-Platform-Based CMFs, iBPMs and CCM*

and tap their preferred engagement modes. It is important to consider an ECM with rich content services for processing any content type over the given channel mix.

2. Analytics for contextual customer interaction. Real-time customer engagement drives results. If put out of context, even creative ideas, strategies, and content, can lose their essence. Employees want to have context for each of the past customer interactions while interacting with customers. This enables them to respond in a timely, relevant and contextually accurate manner. It is essential to look at content services platform that provides efficient content & data analytics services at the core and allows users to consume the business-critical information for delivering the right response.

3. Automated operational workflows for real-time customer services. With the availability of myriad choices, ease and flexibility, today’s digital customers are more empowered than ever before. To surpass customer expectations, businesses should facilitate workers with automated operations so that they respond faster with ease. ECM should have automated workflow services for functional heads to map operational steps so that corresponding front-end and back-end users could work seamlessly and serve customers better and faster.

To empower Business Users

4. 100% accurate content capture for faster turnaround time. Successful accomplishment in the first mile remarkably improves an organization’s customer experience and brings down operating costs, turnaround time, thereby fostering sustainability and profitability. It leaves a great impression on customers, paving the way for organizations to make their customers stick with their brand for long. Hence, organizations should look for full-featured advanced content capture services.

5. Quick capture, easy storage & accessibility of voluminous content. Front office focuses on capturing, storing and accessing information in real-time. On the other hand, back-end workers replicate the same for high-volume operations documents in one go. Robust capture services along with foundational content services over a well-connected content repository are core to diversified operations. And, must be taken into consideration while evaluating the platform.

6. Enterprise-wide content application access. Managing collaborative work demands higher flexibility. Employees want boundary-less access to information so that it gets easy for them to share & access each other’s content, on any device. ECM Mobile applications facilitate field agents and office workers to capture and manage content across boundaries and geographies. Thus, while evaluating an ECM, organizations should consider enterprise-wide access to content with encrypted communication and multi-level authentication.

7. Robotic Process Automation for lightspeed tasks execution. Robotic Process Automation being a business catalyst enables organizations to redefine their operating models and withdraw their workforce from performing monotonous tasks. With the deployment of bots, on-demand analytics and real-time Business Activity Monitoring (BAM), human actions are effectively mimicked, thereby leading to digitized manual work, better throughput and efficient business operations. Bots do more tasks in less time,
handle swivel chair tasks such as data entry, ensure round-the-clock operations and enable workers to be customer-centric over getting involved in trivial tasks.

8. **Rules, regulations and policies compliance.** A Regulatory Compliance Officer has to ensure that operations comply with the set internal and external regulatory programs, standards and policies. Thus, it becomes necessary for organizations to be 100% compliant and consider microservices around records management, archival, process workflows, business rules, and complex events handling.

9. **Deploy, Upgrade & Recover Fast.** ECM is deployed much faster with loosely coupled services over monolithic applications. The 18-months deployment cycles are now a thing of past. This offers assorted choices for customers to fail through fast in their application lifecycle, which reduces overall business risk.

   **Upgrade:** With segregated content services, development teams get the flexibility to update only the relevant pieces of an application. This results in faster iteration and reduced downtime during upgrades.

   **Recover:** ECM built on microservices architecture has no single point of failure as several functionalities are dispersed across different services. Thus, instead of taking the pain of repairing the whole platform, the required service can be repaired with ease.

10. **To facilitate a ‘Boundary-less’ Organization**

   **Repository agnostic ECM to connect disparate DMS.** Several content repositories are used by multiple functional teams across departments. Thus, via distributed but connected repositories, users are bound to focus on “What” over “Where” and access required information. It thus underlines the emphasis for content strategists to look for virtual repository services and make sure that ECM platform is repository agnostic.

11. **Extensibility with content services integration/ aggregation.** As ECM application is intended to be used across business functions along with line of business systems, including CRMs, ERPs, BPM applications, integration complexity poses a key barrier to seamless business operations. Hence, it is important to look for a hybrid integration approach that supports external microservice integration and/or external service aggregation.

12. **User-centric modularity across ECM application landscape.** Busy information workers develop applications around their business requirements via design-driven, low-code application development Graphical User Interface (GUI). The content management features can be effectively reused while developing others business apps. Hence, to build apps faster, it is important to consider user-centric modularity.

13. **ECM application environment & portability.** Microservices architecture based ECM gives businesses the flexibility to deploy selected services in different environments – Public, Private and Hybrid. To produce optimal business results, ECM platform must allow users to deploy different components over required environments.
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14. **Pricing flexibility with predictable ROI.** Functional department’s spending on ECM technology applications is strictly based on the return (in form of any desired metric say monetary savings, employee efficiency, number of transactions, customer handling time, more revenue and so on) vis-a-vis investment made. Business Heads are willing to invest in ECM technology to achieve the desired ROI with predictability.

15. **Monitor business processes for continuous improvements.** Any business stakeholder (whether it’s a CEO, Functional Business Head, IT Head, CIO, Team Manager, Admin, End User) needs to track business processes for timely actions. Thus, while evaluating any ECM, it is important to ensure that there are reporting and analytics services to help generate required information for specific user sets.

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### Seven steps to ECM Technology Strategy

Businesses need to formulate a Digital Content Management strategy that addresses the current business challenges and meet future requirements. Here’s a seven step approach for businesses while thinking about their ECM strategy.

1. Identify and prioritize business processes
   - Understand how other business systems must work with ECM applications

2. Analyze which specified content services are needed
   - Evaluate if the existing ECM platform fulfills requirements or new content services are required

3. Deploy new ECM platform/ Content Services on top of the existing ECM and other business systems
   - Run user onboarding, training and change management programs for managing business processes

4. Gain insights on ROI, process & activity metrics to improve overall efficiency

*Source: Newgen*
Case Study: Transforming Document Management

One of the largest Insurance Companies in Asia-Pacific transforms Document Management with Newgen

Overview
With over 360 million customers, the client is a leading insurance player and marks its presence since the last 50 years. The organization has been conferred with a series of awards for providing innovative products and services to their customers. The organization partnered with Newgen to undertake the digital transformation journey. The implementation enabled the organization to manage their end-to-end enterprise content, right from content creation capture, management, delivery to archival.

Bottlenecks to Enhanced Service Delivery
The organization’s extensive dependency on manual processes, lack of audit trailing facility and high turnaround time widened the gap in its service delivery model.

Managing the growing volume of information and storing physical documents was posing a huge challenge to their process efficiency. These factors prompted the insurance company to take corrective actions and strengthen offerings in the long term. The key areas of concerns were:

- Complexity in accessing data and services across branches
- Managing and searching growing content across multiple applications
- Lack of process visibility
High turnaround time, leading to adverse impact on the brand value

Mismanagement in task allocation

Difficulty in delivering timely communications to customers

The Transformative Roadmap

The organization on-boarded Newgen as their technology partner to transform its document management. To cater to the organization’s needs, Newgen deployed its OmniDocs Enterprise Content Management Suite (ECM). The solution enabled the client with end-to-end document management from creation to disposition of large volume of documents. The solution facilitated secured archival, faster retrieval and efficient information dissemination across the organization.

Benefits Achieved

- **Efficient and transparent administration** – Automated processes and centralized processing resulted in reduced manual handoffs and better visibility

- **Anytime-anywhere information access** – Centralized repository enabled users to collect, search, retrieve, and share information in a seamless manner

- **Better compliance** – Customizable dashboards and detailed reports allowed continuous monitoring. Further, certified records management and audit reports ensured compliance with policies, rules and regulations

- **Enhanced customer experience** – Delivery of contextual content to business users enhanced their efficiency and empowered them to drive contextual customer interactions

- **Minimized operating costs** – Reduced operating costs through electronic handling of critical content, right from its capture, storage, archival to disposition

Key Highlights

- Over 25,000 concurrent business users

- Transformed operations across 2,000 branches, 105 divisional offices, 7 zonal and corporate offices

- Archived more than 360 million policy dockets with 7 million documents

- Enabled end-to-end digitization and life cycle management of documents across the organization

*Source: Newgen*
Newgen OmniDocs Enterprise Content Management Platform

Newgen OmniDocs Enterprise Content Management (ECM) Platform enables digital transformation of organizations by allowing them to build customer-centric content applications. Newgen ECM suite enables businesses to capture information from various sources, store it in a secure, central repository, and make it easily accessible across an organization. The suite extends flexibility to access or deliver content over mobile and cloud, offering a connected digital workplace. It also facilitates enhanced collaboration and smarter decision-making for delivering enriched customer experience.

Newgen’s ECM platform offers extensive capabilities: Content Capture, Content Processing & Storage, Management of Content-centric processes, Delivery of Information, Archival of documents and records.
Newgen OmniDocs ECM Suite

1. **Content Capture** – Leverages smart capture, imaging and data extraction tools to effectively capture vital enterprise information from documents, files, emails and the web. It enables businesses to bring agility to enterprise level document capture and scanning.

2. **Data Processing & Storage** – Enables effective management of high volume operations documents over a well-integrated content repository with intelligent library services.
3. **Content-Centric Process Management** – Orchestrates the flow of content within an enterprise by leveraging a robust process-based framework. It efficiently manages document-centric processes from point of content origination to final delivery of output across multiple enterprise applications.


5. **Records Archival** – Enables organizations to comply with regulatory and governance policies for long-term archival of records. Enforce certified records management with the capability to manage social media records.

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**Business Benefits**

OmniDocs envisages an architecture where content services are available for our partners, customers and developers to create rich consumerized applications.

Businesses can avail the enlisted advantages such as:

- Build fit-for-purpose apps with an ECM platform
- Be repository agnostic by virtually connecting disparate content repositories
- Consume content ubiquitously from any device
- Deliver low code or no-code application design and eliminate dependency on IT
- Improve manageability of the application for scaling, provisioning and monitoring
- Achieve extensibility through easy integration with third party content services
- Achieve predictable ROI with pricing flexibility by paying as per the defined units of ECM application usage

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*Source: Newgen*
The practice of content management, collaboration and dissemination is best-enabled through a set of services that coordinate content usage by all parties – users, systems and applications. Application leaders can use this research to help build a “strategic” vision of a content services platform.

Key Findings

- Technology solutions that enable management and use of content in the enterprise will no longer be monolithic, self-contained solutions, and will be decoupled from user interfaces and data location.

- Interoperable microservices – single-focus tasks that represent a small portion of a larger application – will enable CM elements to be coupled with different third-party technologies.

- Enterprise content solutions/services (in ECM, EFSS, WCM markets etc.) have evolved into “platforms” through a range of APIs that extend the functions/applications built on their own content repository or a federation of repositories.

- Focusing on foundational content services that can surface content in context and in other applications will improve the user experience, and will help you overcome the inefficiencies and limitations of dealing with multiple content silos.
**Recommendations**

Application leaders responsible for content-related initiatives as part of a digital workplace program should:

- Conduct a content inventory and work with key business stakeholders to assess the range of content-centric scenarios within the organization, at a business unit and business process level.

- Analyze content flows, identify current and future needs, and look to prioritize system interoperability where content systems overlap rather than between those that rarely mix (e.g., marketing collateral to web publishing has high overlap; engineering to HR has none).

- Dismiss the notion that one size fits all by developing a strategy that identifies the different content services approaches needed to meet business, user and content processing goals.

- Plan and execute on the content services vision in a bimodal approach by implementing new content applications, components or platforms where required as part of a digital transformation. Extend existing platforms where appropriate.

**Strategic Planning Assumptions**

By 2019, the current ECM market will devolve into purpose-built, cloud-based content solutions and content services applications.

By 2020, 15% of enterprises will have dropped their traditional ECM provider in favor of a provider that offers consumerlike content services.

**Analysis**

As organizations embark upon digital transformation, they are realizing that the old ways of doing things no longer make sense, and that the IT approaches of the past cannot meet rapidly changing business requirements. This has been particularly true for content management (CM). Content is diverse and reaches different audiences inside and outside of the enterprise.

While enterprise CM (ECM) as a strategy offered organizations the promise of a cohesive vision for handling content, from creation to archiving and in between, as a technology approach it often failed at supporting the many ways that content is used, reused and evolves in digital business. Vendors and enterprises have adopted multiple approaches – often overlapping – to delivering content-related technology in the enterprise:

- **Monolithic approach** – Organizations have been frustrated with the cost, complexity and user adoption of monolithic, centralized applications with antiquated interfaces and lengthy deployment cycles. Business stakeholders have reacted by bringing in their own, more-flexible tools to solve their working needs more quickly.

- **Purpose-focused approach** – ECM solutions optimized for a specific department (e.g., legal, finance) or use case (e.g., contract management, HR records, invoice automation). Such solutions may support one audience well but have limited appeal to others in the organization.

- **Application-specific approach** – Content tools with basic capabilities built into ERP, CRM, other LOB, industry-specific, portal or collaboration applications.
Specialized tools approach – Individual content capabilities that meet a very specific need, such as language translation, digital signing, federated search and advanced workflow, and so on.

As a result, today’s content reality is a multirepository, multiapplication world. Content applications are often isolated silos – and the chaos is only getting worse as application-specific tools and cloud-based repositories and applications become more serious contenders. A technology-centered approach to content in the enterprise is no longer sustainable, and is counteractive to digital transformation.

Application leaders, jaded by the failing or underperforming strategies of the past, are now recognizing that the one-size-fits-all approach is no longer optimal. When asked how they prefer to implement content-related technologies, respondents to a recent Gartner survey indicated a mix of approaches, reflecting today’s reality. Fifty-nine percent of the respondents indicated that they preferred to either “allow multiple, best-of-breed tools to give the business flexibility” or “a federated set of content repositories linked through an integration or search layer” (see Figure 1).

A more recent and informal webinar poll showed similar results (see Figure 2).

The influence of the business stakeholder in buying decisions and changes in desired outcomes means that different sets of content tools, services and support are now required, depending on the use case, constituents and content types. While the required functional components are unique to each use case, many individual technologies come from a commonly used set of content-related services. Businesses purchase and configure a wide range of content-related technologies to support numerous digital enterprise use cases.

Figure 1. Preferred Methods for Implementing Content-Related Technologies, Gartner Survey

Source: Gartner (April 2017)

Base: n = 96 Gartner Research Circle Members/External Sample.
Q. Going forward, how do you prefer to implement content-related technologies?

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Flexible Architectural Approach

“Content services” is an overarching term for a strategic technology vision and architectural approach. It is embodied in common technology trends and offerings across a range of evolving, related and intersecting markets (see Figure 3 on page 22):

- **Content services platforms** – Represent the evolution of ECM suites, focused on content management, governance and processing.
- **Content collaboration platforms** – Represent the evolution of the EFSS market, where offerings initially focused on file access and movements have increasingly expanded into collaboration, workflows and platform.
- **Digital experience platforms** – Represent the evolution of horizontal portals and web content management (WCM) to provide a uniform foundation for engagement and interaction with audiences.

These separate markets are related and have some overlap in base capabilities and use cases – especially between content services platforms and content collaboration platforms.

As noted in Figure 4 on page 22, content services consist of applications, platforms and components.

Content services are a set of services and microservices, embodied either as an integrated product suite or as separate applications that share common APIs and repositories, to exploit diverse content types and to serve multiple constituencies and numerous use cases across an organization.

Content services platforms give enterprises many more strategic as well as technology options. Instead of buying a relatively complete system from a single vendor, organizations can assemble a more appropriate content system by combining many content services offerings and vendors, eliminating the inefficiencies and limitations of dealing with multiple content silos.
Figure 3. Content-Related Markets

Source: Gartner (April 2017)

Figure 4. Content Services Conceptual View

Source: Gartner (April 2017)
Application leaders should consider this model when planning their content strategy. They should identify which service categories are relevant to their specific organizational outcomes, then implement this model through one or more content services platform products.

As previously indicated, a content services platform will have its own repository and may also integrate external repositories through connectors and APIs or packaged integrations. Content services platform providers offer integrated sets of content-related services, microservices, repositories and tools that support common content use cases. Content services platforms are available on-premises, in the cloud or in hybrid architectures.

We see platforms as distinct from applications or components, which can be briefly summarized as follows:

- **Applications** – Business-solution-focused capabilities – for example, an investigative case management application, an invoice processing solution or a lightweight external collaboration application.

- **Components** – Utility-based services that add additional capability to existing applications and platforms – for example, natural-language processing text analytics or a content translation service.

In some cases, platforms will still provide applications or components that could be otherwise acquired separately. This is particularly true where content services platform providers also offer vertically aligned solutions (i.e., content services applications) for particular business operations. Organizations should assess the fit of these applications versus the wider content services application market to their business need.

Content services is a transformation that will take time to be fully realized. In the short term, we expect that organizations will initially continue to purchase content processing-centric platforms from vendors such as OpenText, Hyland, Microsoft, IBM, Oracle and others. We also expect that customers will begin purchasing content collaboration platforms from vendors such as Box, Dropbox or Egnyte to support content services strategies.

**Baseline Content Services**

According to our market definition, a content services platform must provide a baseline set of common services and microservices focused on essential administrative, security and functional capabilities that support generalized CM and processing use cases (see Figure 5 on page 24). Content services applications will be built using these services and microservices. However, in a services-oriented world, application leaders will no longer be tied to the idea of buying a package that does everything within it. Some services may come from other platforms or stand-alone providers; these components add additional capability to content services applications or content services platforms.

**Content Services Strategy**

Based on discussions with Gartner clients, we know there is an increasing desire to embark on digital transformation and architecture modernization. Content services platforms can help meet those goals, though for some it will be via a bimodal IT approach. Content services represent a multiyear evolution for the former ECM market, and there are still many Mode 1 platforms that are in the data center and will continue to be so for some time. They offer integrated services and repositories, an architecture that was built and optimized for storing and managing content, specialized experiences, and a purpose-focused point of view. Future content
Figure 5. Content Services Platform Baseline Services

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<thead>
<tr>
<th>ADMINISTRATION</th>
<th>REPORTING AND ANALYTICS</th>
<th>CONTENT SECURITY</th>
<th>DEPLOYMENT, DELIVERY AND PUBLISHING</th>
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<td>Content Analytics</td>
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CMIS = content management interoperability services; IM = instant messaging; LOB = line of business; ML = machine learning; UCC = unified communications and collaboration

Source: Gartner (April 2017)
services platforms enable Mode 2 IT approaches. They will be cloud-native with “assembled” services and repositories, an ecosystem point of view, consumerized experiences, and sufficiently agile in their delivery to meet different use cases.

While the content services approach provides more flexibility, it potentially can lead to more complexity. Enterprises can now assemble a more appropriate system from many vendors – like fitting together Lego blocks. Thus, application leaders in charge of content-related initiatives are now trying to determine, “Which Lego blocks do I use? What are my options?”

It is important for application leaders to determine the use cases and desired business outcomes, and analyze how content flows in the organization as well as outside the firewall. Once that has been done, select the platforms, applications and services best-suited for your desired outcomes. For example, a customer experience initiative would require a content services platform with digital asset management, personalization, and deployment and publishing services.

A content strategy looks like most enterprise technology programs. It acts as a set of guiding principles and approaches for delivering content services. It takes into account the operational, functional and business requirements of the organization. When developing requirements, application leaders should include stakeholders from the lines of business. Work in conjunction with business representatives to prioritize user experience from start to finish, focusing on simplicity and integration into common workplace tools. Identify and prioritize what scenarios will be necessary to drive efficient and effective consumption of and interaction with content.

What is most critical is to determine what content services “nirvana” looks like for your organization. Few organizations start from a “greenfield” state, but, depending on your organization's investments and willingness, a content services strategy is an opportunity to establish a whole new approach or to simply evolve existing approaches over time.

Your starting point may be to prioritize integration capabilities or federated search where systems heavily overlap; or it may be to focus on using a Mode 1 approach to content services platforms for existing use cases, such as records management or back-office functions. In more revolutionary situations, you might adopt a Mode 2 approach aimed at digital transformation.

Gartner recommends that application leaders take these initial steps as they develop the strategy:

1. Determine the most mission-critical business processes for the organization or organization unit under consideration.

2. Determine where content is fed into each business process, how each process relies on that content, and where each process outputs that content. Identify the repositories, systems and file types of that content.

3. Understand the services categories that will support the above business processes, using high-level analysis of those processes.

4. Develop a vision for how existing content services in the organization or new services will meet the demands of the business. As this is a reasonably large and analysis-intensive undertaking, it would be best to prioritize areas with significant business need.
5. Plan and execute on the above vision, implement new content applications, components or platforms where required, and extend existing platforms where appropriate.

6. Avoid taking a monolithic approach based on one single content repository; break down and rebuild your enterprise content infrastructure; identify and deploy the technology components required to deliver on business outcomes.

7. Put in place user education and effective change management to maximize understanding and adoption of the vision.

Evidence
In conducting this research, we gathered information on trends using:

- Analysis of Gartner’s client interactions
- An online survey of the Gartner Research Circle (a panel of IT and business leaders in which we received 180 qualified responses)
- An online poll conducting during a webinar
- Direct conversations with Gartner clients and other individuals

Source: Gartner Research, G00325087, Karen M. Shegda, Karen A. Hobert, Michael Woodbridge, Monica Basso, Mick MacComascaigh, 3 April 2017
Intelligent Business Process Management Platform

Newgen OmniFlow Intelligent Business Process Suite (OmniFlowiBPS) provides a process platform for business stakeholders to drive enterprise-wide digital transformation. It manages a complete range of business processes by leveraging advanced tools for content integration, process orchestration, predictive and on-demand analytics, enterprise mobility and social collaboration. OmniFlow iBPS offers dynamic case management capabilities, which allow decision-makers to respond to real-time opportunities, challenges and other unanticipated situations while maintaining a high level of collaboration.

Enterprise Content Management

Newgen OmniDocs Enterprise Content Management Suite (ECM) allows digitization of enterprise content and information. The platform provides smart tools to capture and extract information from various sources, classify, store, archive, retrieve as well as dispose content and documents required in day-to-day business operations. It provides flexibility to access or deliver content over mobile and cloud, creating a highly connected and digital workplace. It offers a robust US DoD 5015.02-STD certified Records Management System to ensure compliance with regulatory requirements around management of records.

Customer Communications Management

Newgen OmniOMS Customer Communication Management Suite (CCM) offers a unified communication platform that allows enterprises to enhance their customer experience by delivering personalized, targeted and consistent communications through various channels.
Newgen Enterprise Mobility Framework

Newgen Enterprise Mobility Framework (NEMF) is a smart way for enterprises to undertake enterprise-wide mobility initiatives and enable digital transformation. It is a framework to develop, deploy and manage highly configurable hybrid mobile apps that support multiple business functions. NEMF provides plug and play components, enterprise class security, advanced data and document capture capabilities and adaptors for integration with back-end systems to enable rapid, low code app development.

Newgen iBPS Robotic Process Automation (RPA)

Newgen iBPS RPA is a core component of Newgen OmniFlow iBPS. It comprises robotic agents and a robotic control center, enabling organizations to create, deploy, manage and monitor bots. The control centre facilitates robot configuration, deployment, robot cloning and credential management. Further, the Business Activity Monitor (BAM) module enables continuous monitoring through detailed logs, audit reports and alerts in case of exceptions.

Newgen Digital Sensing Platform (DigiSense)

Newgen Digital Sensing Platform continuously listens to customers across channels, discovers context and initiates appropriate back-end processes to detect business opportunities and in turn make the most of the discovered business opportunities. It helps organizations to create/ modify value-driven business models as well as harness up-sell/ cross-sell opportunities effectively.

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- Commercial Lending
- FATCA Compliance
- Trade Finance
- Collections and Payment Systems

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- Correspondence Management
- Agenda Management
- Citizen Centric Services
- Office Automation
- Grants Management

BPO/IT
- Accounts Payable
- Accounts Receivable
- Invoice Processing
- Vendor Portal

Healthcare
- Provider Contract Management
- Complaints, Appeals and Grievances Management
- Mobile Member Enrollment
- Claims Repair

Learn more about Newgen’s solutions built on its iBPMS, ECM and CCM platforms.

Source: Newgen
Customer Speak

We have partnered with Newgen to revolutionize our customer experience and breed innovation across customer acquisition and retention strategies. Newgen’s scalable e-DMS has facilitated the automation of critical business processes and rendered us a dynamic view of customer information. This has resulted in improved business performance and productivity through faster turn-around times, and enhanced visibility across transactions through real time dash boards and stronger monitoring abilities.

“As the leading banking organization in Cyprus, we are constantly striving to discover and utilize new technological innovations which would enable us to optimize our operations, cut costs, enhance the value of our services, and hence further distinguish ourselves from competition. In such turbulent times, solutions provided by Newgen such as their BPM and DMS platforms enabled us to realize our strategic aim of offering fast, effective, and innovative customer services which can rapidly respond and adapt to market needs.”

Steven Oluoich
Chief Executive Officer
ICEA Lion Group

Charis Hadjgregoriou
Team Head (Business Process Management)
Bank of Cyprus
About Newgen

Newgen Software is a vendor/provider of Business Process Management (BPM), Enterprise Content Management (ECM), Customer Communication Management (CCM), Document Management System (DMS), Workflow and Process Automation software. The company has a global footprint in over 60 countries with large, mission-critical solutions that have been deployed in Banks, Insurance firms, BPO's, Healthcare Organizations, Government and Telecom Companies.


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