

M-Files[®]
The Smarter Way to Work.



The Ten Commandments for Controlling Your Information within a Remote Work Environment



IS WORKING FROM HOME THE NEW NORMAL?

Working remotely and even from home has grown increasingly common in the past few years. At the same time, many businesses only allowed it only for specific situations and not as an everyday standard. Some companies regarded it as an occasional perk or allowance but really weren't ready to deploy the majority of their employees to their home offices.

The 2020 COVID-19 pandemic abruptly made working at home so commonplace that the [Society for Human Resource Management \(SHRM\)](#) called it the “new normal.” In fact, in an [M-Files blog post](#), CMO Maria Carballosa predicted that COVID-19 will bring about a massive paradigm shift:

“The concept of working remotely has been around for a long time and the current situation is simply accelerating the need for businesses to fully utilize available technologies to resolve it. Companies must now enable a more flexible workplace and ensure their knowledge workforce is fully productive while working remotely; there is no turning back and this is no longer a nice to have. This is now business critical. That is not to say that we will all be remote from now on, but we won't go back to the way it was either.”

After the COVID-19 outbreak, businesses deployed their knowledge workers to their home offices and kitchen tables to continue their day-to-day work — all to protect their safety and comply with stay-at-home measures.

This sudden shift created a yardstick by which companies could legitimately be measured. Who was ready and who wasn't? Whose digital transformation strategy could stand up in the face of a real test like this?

Some companies proved themselves more ready for this change than others. To be fair, this business disruption occurred quickly and with almost no warning. On the other hand, rapid changes without much warning are typical characteristics of business disruptions. Organizations that adapted fast had the demonstratable agility they would need to react to future challenges.

Obviously, businesses that already had the infrastructure in place to adapt easily fared much better than those that needed to start from scratch. Remote-ready companies had the type of information management that would allow them to access business-critical information, while maintaining strong security, efficient workflows, and, of course, both employee and customer satisfaction.

In this Information Age, the difference between fast adopters and slower ones tends to come down to their information management strategy and the tools they use to implement it. This remains true even after disruptive events like COVID-19, when the immediate results of the pandemic are lifted, and businesses need to get back to a reality where the ways of working have changed.

In this whitepaper, we summarize the characteristics of a company's information management strategy needed to ensure success. We'll also demonstrate how the right tools can provide those benefits to any business.

THE SUDDEN RISE OF THE REMOTE WORKFORCE DURING THE CORONAVIRUS OUTBREAK

Some of the first companies to turn to a virtual workforce during the pandemic included Google, Facebook, and Microsoft. These companies were located in early virus hotspots across the US west coast. At the same time, they already employed the technology and business culture that allowed for work and collaboration from remote locations. It's not surprising that both their employees and infrastructures easily transitioned to working from home.

Of course, the new normal of remote working did not just apply to the most digitally advanced businesses. The coronavirus crisis impacted the entire world in the blink of an eye. In the midst of the sudden change, SHRM reported statistics that demonstrated the sudden surge in remote working for one large law firm's clients:

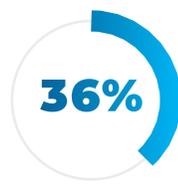
SURGE IN REMOTE WORK

To measure the employer response to the COVID-19 crisis, law firm Seyfarth sent a flash survey to its clients and collected responses from 550 U.S. employers from March 12 to March 16

The results showed



of employers surveyed were taking steps to allow employees to work from home who don't normally do so.



were actively encouraging all employees to work from home in some or all parts of the country as of mid-March



were encouraging employees to work from home on a case-by-case basis



were encouraging employees to work from home in hot spots

When two-thirds of businesses suddenly had to give their employees the ability to work from home, it's easy to conclude that all of them can't be very tech-focused companies. And even though almost every kind of business can benefit from advances in technology, they're all at different stages of their digital transformation.

As an example, Dara Conroy serves a nonprofit publisher as its Chief Human Resources Officer. [She said](#) they'd allowed some remote work in isolated instances before, mostly for bad weather or for parents who needed to care for a sick child. When stay-at-home orders went into effect, she said they needed to rush to make even minor changes — like encouraging employees to use email instead of meeting in person. They also needed to supply laptops to a number of employees who didn't already have one.

The company also rapidly trained some employees to use videoconferencing. As they rushed to come up with make-do solutions, one of the biggest problems they still faced included maintaining their team culture of collaboration, which Conroy said was one of the company's strengths. For that business and many others, the move to a remote workforce caused them to drastically shift their business processes and even their culture almost overnight.

Employer vs. Employee Concerns Over Remote Work



When such dramatic and sudden changes occur, unprepared companies deal with plenty of obstacles. Naturally, businesses and employees expressed different concerns over the sudden move to working from home:

TOP EMPLOYEE CONCERNS:

SHRM mentioned some struggles employees had when they suddenly transitioned from their business office to a home office. These included finding solutions for collaboration and communication, sometimes when one team member worked not just in a different location but also in a different time zone than other participants. Employees of many companies didn't just need to interface with a local team but with a variety of scattered partners and customers.

TOP EMPLOYER CONCERNS:

Alternatively, IT security professionals had different concerns, as noted by [Info Security Magazine](#). Some of the most important topics include physical security of devices, securing remote access, protecting data, using good passwords, resisting phishing attempts, and avoiding or detecting malware. Besides security, businesses also had to rapidly adjust business processes to allow for remote collaboration and information sharing. They also needed to prioritize the need to ensure customers remained satisfied with service. Naturally, some employees and departments turned to off-the-shelf solutions that weren't necessarily approved by their employers, so nobody could ensure they met governance policies or even offered the best solution for efficiency and quality.

THE TEN FEATURES OF HIGH-PERFORMING REMOTE WORKPLACES

No doubt, the 2020 coronavirus outbreak generated plenty of disruption for businesses that had mostly relied upon traditional workplaces. Many businesses struggled, but if anything positive can come out of this, it's the lessons that the business community learned about the best information, collaboration, communication, and process management tools that can provide solutions for both companies and employees.

Organizations that can adapt should emerge from this setback stronger because they've grown more flexible and adaptable. These new tools can help reduce waste, improve efficiency, and even help recruit and retain good employees with the attraction of a modern workplace.

Andrie Neocleous, an information management and digital transformation veteran with M-Files' partner Iron Mountain Europe, noted that technologies like intelligent information management already exist to provide the reliable and rapid transformation that businesses need. Not only can a smart information management system enable a remote workforce rapidly during a crisis like the coronavirus outbreak, it can improve productivity and efficiency during the normal course of business:

"My ten-year experience at Iron Mountain, has taught me that business transformation and particularly digital transformation have not been as high a priority as they should be, although organizations have been researching options and solutions for some time. Market conditions, however, have revised these priorities due to the pandemic and their transformation has become imperative."

Andrie Neocleous | Iron Mountain



With that in mind, consider ten priorities to control information and workflow within a remote workplace.



1 Enable Remote Access

Users need to access and manage critical documents and files from wherever they need to work and with a variety of different devices. Employees, managers, and other stakeholders should have the same access to the information they need at home as they would enjoy in their office at corporate headquarters.

Today's [information management systems](#) — like M-Files — allow users have the same interface and view of information if they login via a computer or mobile device, and they can gain access to their data and workflows from anywhere with an internet connection. M-Files even features the ability to take content offline. Our [automatic online and offline transition](#) offers the ability to work even without the internet connection. And when employees get back online, they can then contribute and update with all that they worked with while offline.

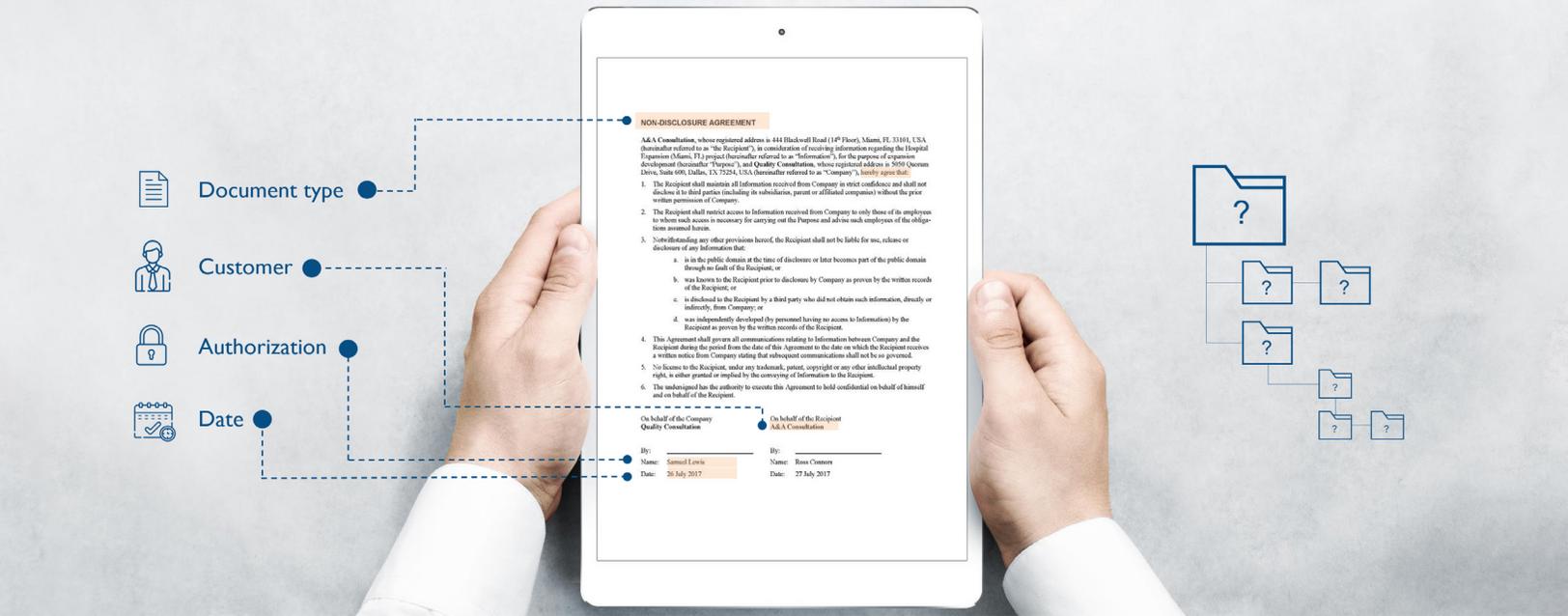
Ultimately, businesses need to lean into the empowering of remote workers who might need to do their jobs at a client's jobsite, a coffee shop, a hotel room, or an airport lounge. With the right tools in place, nobody needs to carry around file folders of paper documents or download everything to their laptop before a business trip or weekend spent catching up. They will have access to everything they need by logging into one interface, including the ability to collaborate and communicate with their team, managers, and other stakeholders.



2 Control Sensitive Information

In the process of making information accessible, organizations also need to ensure its security. Businesses without robust security make themselves vulnerable to a variety of threats that might allow criminal actions or even accidents expose valuable, sensitive data. Modern information management systems provide good information governance practice and automated workflows for information management, in addition to encryption and other [security features that protect information](#) in compliance with any internal governance or government regulations that apply. They can also enforce good credentials, including two-factor identification, to keep security lapses at bay.

Security features also allow administrators [set security access](#) to specific documents or files by user, department, role, or even meta tags. This makes it simple to enforce security rules. It's also easy to modify it in case rules or even individual roles change. Employees will appreciate their ability to use any device to securely login to the system to find the documents they need. People without authorization won't even see that these documents exist.



Keep Information Searchable, Organized and Classified with Metadata

Metadata simply refers to tags that contain information about the files they're assigned to. Some people might also call them search terms or keywords. These tags define, describe, and classify documents and other kinds of data to make them easier and faster to find, no matter where they're stored.

93% of workers are unable to find a document because it has been poorly named or filed. In M-Files, because information is tagged with metadata based on what it is, the same information can be searched for and found using different criteria depending on the use case. Unique information shows up dynamically where it is needed without duplication.

Take a project invoice for example. The project manager will need to see all data related to the project, regardless of what type of information it is. On the other hand, the accounts department needs to find invoices easily based on date, status, or the project they belong to.

An intelligent document management system can also help enforce metadata rules to keep them consistent and in compliance with standards that ensure best practices for data entry and organization. The obvious benefits include the ability to neatly categorize information to enable more efficient searches and organization.



4 Employ Artificial Intelligence

[Artificial intelligence](#) empowers information management systems to reduce data entry errors, enforce consistent information and metadata tags, and even help manage workflows. The system keeps getting smarter the more it gets used. For instance, it can suggest metadata based on the document's content, its own prior history, or set rules.

Using natural language processing, it can also understand not just the meaning but also the context of text in order to understand the relationships between one document and another. This helps companies know what data they have and how it relates to other information within the system.

Besides keeping data organized and classified, it also reduces entry errors and improves data quality. It can also help businesses prioritize content, based on things like importance or privacy needs — uncoupling business-critical information from trivial information.



Create and Enforce Well-Defined Information Flows with Automation

Often, documents need to pass from one person to the next for review, approval, or other processes in the workflow. Not only does an intelligent information system store documents, it can even [move documents and tasks through their designed lifecycles](#). Once the information passes to a new person, that individual will get an alert that a task needs their attention.

Even better, project managers or other stakeholders can see where the task is in the process, status of completed work, what was done, and what's still in the queue. These features help reduce logjams, allow for transparent and quick project updates, and make workflows efficient and orderly.

M-Files can also ensure stakeholders get updated to such critical communications as changing business or training requirements or government regulations. For instance, the system can handle training materials, alerting employees that it's time to attend to them, and then let project managers know who has completed the assignment and who needs another prompt.



Ensure Employees Can Find a Single Version of Truth

Besides keeping track of where information sits in the workflow, the system also provides version control and an audit trail. In case of any issues or questions, it's easy to backtrack to see who took which actions with the information. This feature makes it easy to track down problems, answer questions, spot trends, and recover information.

It reduces the common problem of figuring out which version of a document is the correct or most current one. As an example, say a department head attached a copy of a spreadsheet to several managers for their input. That department head might get back multiple copies of the spreadsheet, all with different updates. Then, those several versions would then need to be manually verified and collated together into one usable document.

A modern information system like M-Files would keep the spreadsheet in one place, with an audit trail and version control. Those features would turn a formerly time-consuming and error-prone task into a simple and reliable one. Alerts and audit trails will also let the owner of the information know who made which updates and who failed to provide their input. Modern information systems protect data quality and timely business processes.



Reduce the Number of Information Silos

Most businesses already have a number of systems for functions like accounting, sales, and inventory. Since many companies also partner with other businesses as investors, suppliers, or customers, they also might need to interface with multiple other systems. Yet many functions need to draw information from various sources to make decisions and complete reports. Judging by multiple surveys and studies, knowledge workers spend a lot of time simply looking for the information they need.

M-Files can pull information from databases, other software, or even file folders stored on a company server or in the cloud. It also has its own repository that businesses may choose to use for storage. When a user logs in to the system, he or she can pull information from any source through one intuitive interface. The information management system should recognize what a piece of information is, regardless of where it is.



Connect Structured Data to Unstructured Documents

IT professionals like to think of information as data stored in a structured format, making it simple for traditional software systems and ad-hoc queries to access and process. For instance, an organization might store structured data inside a relational database or spreadsheet where it's all neatly organized and indexed to make it easy to find, understand, and process.

However, much of a typical company's information is stored as unstructured data. That means it's not organized, grouped, or indexed in some structured fashion. Some examples include contracts, receipts, and even emails, or scans of letters. Companies may also glean information from graphics, videos, photos, or phone messages. Even machines may generate such unstructured data as satellite images or data from weather sensors.

Even though unstructured data lacks organization, it may still be important and valuable. As mentioned in an earlier [M-Files post](#), about 90% of an organization's information is unstructured data. Some examples of the ways that intelligent information systems can make sense out of this kind of information include:

- **Discovery of business-critical data, separating it from clutter to manage it properly.**
- **Natural language processing to understand language in context and extract valuable information.**
- **Pattern recognition processing can identify objects, people, or animals in graphics and videos.**
- **Speech-to-text processing can convert the information from audio files into searchable text files.**



Select the Right Deployment

As an enterprise information management system helps businesses classify and prioritize their information, they will find they may have different storage requirements for various kinds of data. For instance, [cloud storage](#) may provide flexible and cost-effective storage for typical information. On the other hand, sensitive documents and databases might require [on-premises or hybrid-cloud solutions](#).

Organizations need to select the best deployment for their business or even for specific sorts of data. They should analyze their own business requirements and not accept limits imposed by existing software. Naturally, they need an information system that's flexible enough to work with any and all storage solutions and to integrate with other systems.



10 Ensure the Information Management Strategy Can Scale

Today's organizations should consider change inevitable. Business requirements will vary not just in size but in scope. That's why an information system needs to accommodate rapidly shifting requirements for storage needs and also in the types of activities that it can handle. It's not enough for an information system to work with various kinds of information by providing superior document management; it also needs to address business requirements like project management, auditing, collaboration, training, and compliance.

In days past, employees simply walked down to the nearest available conference room for meetings or collaboration. When they suddenly rushed to enable their remote workforce, they needed to provide a virtual workspace to replace meeting rooms and shared offices. The right information management tools can give them co-authoring features, version control, and all of the tools that they would need to work together, even though the various participants may be located miles apart, even in different time zones or countries.



HOW M-FILES HELPS ORGANIZATIONS ADHERE TO REMOTE WORKING BEST PRACTICES

M-Files provides businesses with enterprise-scale tools that have fundamentally changed the perception of what a document management system can do. While the system offers a repository, it's not limited to one central storage place. In fact, M-Files is repository- and storage-agnostic and can integrate information from many different kinds of software and storage mediums. Users with the proper credentials can easily find and work with anything they need by using one intuitive, sensible interface.

Naturally, it provides the features that employees can use to view, edit, and track documents. Beyond those basic functions, it also allows for collaboration, communication, and version control, so team members can work together while reducing errors. AI, machine learning, and natural language processing can even extract relevant information from such unstructured data as videos, text messages, or satellite data. Automation will keep workflows moving efficiently, and audit trails make it easy to find the source of issues or gridlocks in the process.

Besides offering flexible access from anywhere and any device, M-Files has certified security to protect critical information. While making it easy to comply with any business governance policies or legal regulations, M-Files makes it easy for security administrators to set up sophisticated rules to keep data in the right hands and out of the wrong ones. If questions ever do come up, audit trails will report upon the when, what, and who of any changes, plus version control makes recovery a breeze.

SEE HOW M-FILES CAN EMPOWER YOUR FLEXIBLE WORKFORCE

Of course, M-Files won't just empower your remote workforce. It will improve employee productivity, reduce waste, and provide a good experience for employees, customers, and other stakeholders in any sort of project or service. M-Files will also allow you to provide enterprise-grade security to provide another layer of protection against security threats and leaks that have grown all too worrisome for companies that employ remote workers.





ABOUT M-FILES

M-Files provides a next-generation intelligent information management platform that improves business performance by helping people find and use information more effectively. Unlike traditional enterprise content management (ECM) systems or content services platforms, M-Files unifies systems, data and content across the organization without disturbing existing systems and processes or requiring data migration. Using artificial intelligence (AI) technologies in its unique Intelligent Metadata Layer, M-Files breaks down silos by delivering an in-context experience for accessing and leveraging information that resides in any system and repository, including network folders, SharePoint, file sharing services, ECM systems, CRM, ERP and other business systems and repositories. Thousands of organizations in more than 100 countries use M-Files for managing their business information and processes, including NBC Universal, OMV, Rovio, SAS Institute and thyssenkrupp.

For more information, visit LamininSolutions.com or call 1-904-810-3299.

M-Files is a registered trademark of M-Files Corporation. All other registered trademarks belong to their respective owners.

Europe

+44 23 9408 0009

USA

+1 904-810-3299

Laminin
SOLUTIONS
UNLOCK BUSINESS INFORMATION

✉ sales@lamininsolutions.com [@lamininsolution](https://twitter.com/lamininsolution) [in LinkedIn/Company/Laminin-Solutions](https://www.linkedin.com/company/laminin-solutions)