PREPARE YOUR ORGANIZATION FOR THE NEW ERA OF KNOWLEDGE WORK.
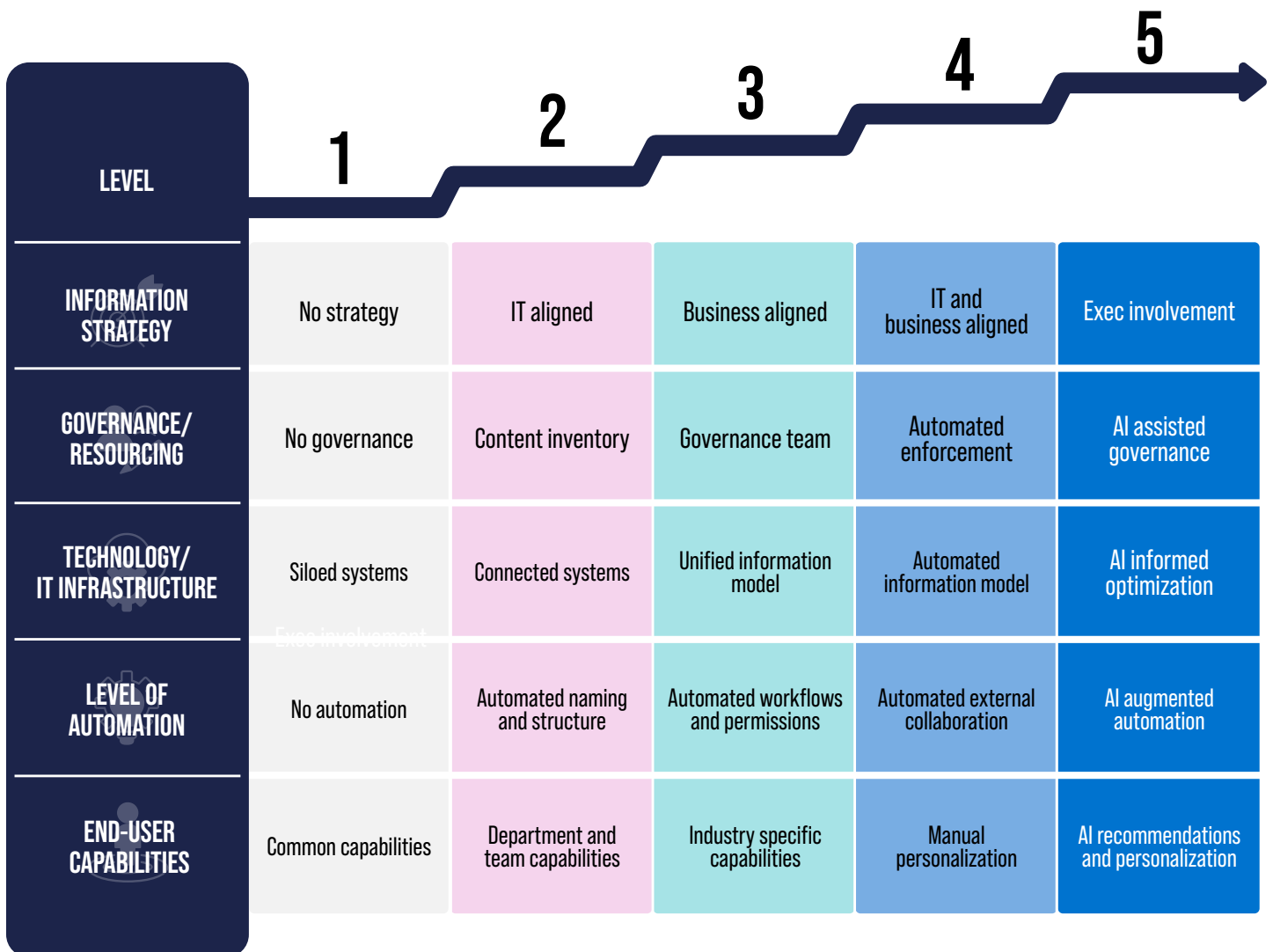
Generative AI has created an unprecedented wave of innovation in processing vast amounts of information and creating new content. Organizations are eager to tap into these new innovations to enable greater levels of knowledge work productivity, improved customer experience and employee satisfaction.

With the excitement also comes confusion and hesitation. No technology alone will solve organizational challenges and many organizations have already failed in their early experiments. Most AI technologies require solid foundations to produce reliable and accurate results and many results organizations are seeking can be achieved with more traditional automations.

Before launching major AI initiatives, organizations need to understand their readiness to adopt new innovations. They need to assess their current capabilities and carve a path to greater levels of maturity. The M-Files Knowledge Work Automation Capability Maturity Model has been designed to assist both in assessing current state and uncovering the steps towards a desired state.

The model covers five essential categories for knowledge work automation with five levels of maturity in each. This document explains each of these categories and the progression in maturity.

LEVEL	1	2	3	4	5
INFORMATION STRATEGY	No strategy	IT aligned	Business aligned	IT and business aligned	Exec involvement
GOVERNANCE/ RESOURCING	No governance	Content inventory	Governance team	Automated enforcement	AI assisted governance
TECHNOLOGY/ IT INFRASTRUCTURE	Siloed systems	Connected systems	Unified information model	Automated information model	AI informed optimization
LEVEL OF AUTOMATION	No automation	Automated naming and structure	Automated workflows and permissions	Automated external collaboration	AI augmented automation
END-USER CAPABILITIES	Common capabilities	Department and team capabilities	Industry specific capabilities	Manual personalization	AI recommendations and personalization

INFORMATION STRATEGY

Organizational alignment plays a pivotal role in the success of digital optimization efforts. Company leaders must understand the strategic importance of managing information, articulate a clear vision and goals to the organization and ensure they dismantle silos across the company.

KEY QUESTIONS

- *To what extent does the company think about content as a strategic asset?*
- *Which stakeholders are involved in defining the information strategy?*

GOVERNANCE/ RESOURCING

No strategy can be executed without governance and resourcing. Successful digital optimization requires a balance between governance and strategic resource allocation. Organizations that master this interplay are best positioned to fully leverage the benefits of the information strategy.

KEY QUESTIONS

- *How is the content strategy governed and enforced?*

TECHNOLOGY/ IT INFRASTRUCTURE

Systems, integrations, and their data flows are the foundation of a digital optimization strategy. As companies mature to more unified and then automated information models, benefits continue to increase and companies become empowered to make informed decisions, optimize processes and reduce manual effort and risk.

KEY QUESTIONS

- *How does the technology stack support content strategy and governance?*

LEVEL OF AUTOMATION

As companies embrace more mature levels of automation, they realize greater benefits. Benefits expand from consistency, compliance, and scalability to decision support, real-time insights, and creativity. Embracing automation and AI in content and information management leads to greater outcomes for both the organization and the knowledge worker.

KEY QUESTIONS

- *How does the technology stack support content strategy and governance?*

END-USER CAPABILITIES

Organizations that value the digital experience of employees realize greater outputs, quality, and employee satisfaction. As companies implement more end-user capabilities and consider functional and industry specific needs, knowledge workers will experience greater satisfaction and empowerment.

KEY QUESTIONS

- *How well do the content capabilities support end-users?*

BENEFITS OF PROGRESSING IN LEVELS

INFORMATION STRATEGY

1. **Missed opportunity.** Plenty of room for growth, profitability, employee, and customer satisfaction.
2. **Suboptimization.** IT investments are a little more optimized, but «shadow IT» still exists within businesses.
3. **Duplicated efforts.** Many teams engage in vendor evaluations, contract negotiations and projects.
4. **Optimized operation.** Information systems and processes are well run and support business needs.
5. **Strategic advantage.** Outperforming peers in all relevant business metrics.

GOVERNANCE/ RESOURCING

1. **Blindness.** Potential to increase awareness of content systems and processes.
2. **Awakening.** Understanding the current state creates potential for improvement.
3. **Action.** Nominating people to take care of governance starts to create real impacts.
4. **Scale.** Automation enables enforcement of policies across businesses and departments.
5. **Standardization.** AI helps ensure all legacy repositories are leveled up to the same standard.

TECHNOLOGY/ IT INFRASTRUCTURE

1. **Silo.** Opportunity to increase flow of information.
2. **Visibility.** Information flows between systems creating better access.
3. **Insights.** Access to uniform data allows for companywide insights.
4. **Consistency.** All content and data follow the same standard creating significant benefits.
5. **Sophistication.** The insights are being taken into action, further optimizing business results.

LEVEL OF AUTOMATION

1. **Stagnation.** The benefits of information technology are waiting to be unleashed.
2. **Structure.** People waste less time saving and finding information.
3. **Productivity.** Automation drives significant improvements in employee experience.
4. **Collaboration.** Cross-company digital processes increase brand, professionalism and effectiveness.
5. **Innovation.** Employees are truly empowered to spend all their energy on innovation and creation.

END-USER CAPABILITIES

1. **One size fit all.** All teams must figure out how to best survive with with what they have.
2. **Functionality.** Different departments and functions feel more effective in their work.
3. **Specialization.** The employees and company can increase performance in their field of business.
4. **Personalization.** Employees feel empowered and achieve their best work.
5. **Inspiration.** Employees feel delighted and form beneficial connections across content and people.

LEVEL 1 BEGINNER

No strategy

There is no strategy for content. Content is not recognized as an asset but simply part of the work.

Leaders, managers, and employees don't have the time, energy, or willingness to look past the day-to-day operations.

No governance

There's no governance for content. Content gets created, stored, and managed according to the habits and preferences of individual employees, teams, or departments within the organization.

People might complain about the difficulty of finding information or voice dissatisfaction with re-inventing the wheel all the time, but nobody takes action or ownership of these challenges.

Siloed systems

The systems used to create and manage content are all in their own silos. When new systems are needed, they are deployed standalone without much thought of the relationship to other systems.

Employees regularly access multiple systems per day and content sprawls across these systems. It is often hard to remember where a piece of content exists, and some content might be saved in multiple places.

No automation

All content processes are manual. Content might be created and stored in a digital format, but every step of every process requires conscious efforts from employees.

Employee productivity is hindered by manual work and managing information gets harder as the organization grows.

Common capabilities

All end-users have the same capabilities despite their function or role.

Some user groups might be content with the status quo while others find daily work harder due to the lack of tools supporting their line of work.
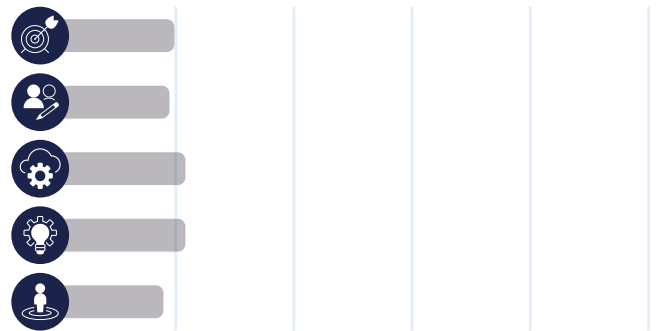
LEVEL 1 BEGINNER

Recommendations

Organizations in the early stages of maturity have a significant potential for improvement. That potential translates to quantitative benefits in growth, profitability and customer and employee satisfaction. Based on a M-Files commissioned study by Forrester Research, an average gain from implementing M-Files provides a 294% ROI. That return will be even greater when companies start from low maturity.

The first practical step in this stage is showing business leaders the financial impact of increased levels of maturity. One approach for calculating that is shown in the M-Files Total Economic Impact Study by Forrester.

Once there's a buy in for improvement, it is time to select a high-impact use-case and a program.

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M-Files has been a game changer for us and has helped us elevate our business. Without M-Files, it would take people at least double the amount of time to do their work.

CIO, Consulting

Forrester Total Economic Impact™ study 2023 commissioned by M-Files

LEVEL 2
BEGINNER/INTERMEDIATE

IT aligned

IT has defined a strategy for content, but it has not been socialized with the business. The strategy focuses on broader enterprise level platforms that support all businesses and functions.

Purchasing decisions and investments are influenced by this strategy but sometimes create friction between IT and business. Due to this friction, the business has pockets of «shadow IT» where they make their own investments.

Content inventory

To form the basis of the content strategy, IT has created and maintains an inventory of systems that are involved with content. That inventory is also part of regulatory documentation needs, such as GDPR, that mandates organizations to specify the systems that process personal data.

That inventory is not perfect and contains only the official systems recognized by IT.

Connected systems

The systems related to content are integrated with other systems, helping employees access content from where they need it. When there's a need for a new system, the question of content is always addressed as part of the deployment process.

Due to the integrations, users have less problems with finding information or lacking access rights to the content.

Automated naming and structure

Content naming and organization is automated. When creating new content, the file name and the location and/or metadata are automatically handled.

Automated naming and structure help save time both when filing documents or finding information. The increased consistency also creates a feeling of safety and control, contributing to employee satisfaction.

Department/team capabilities

Teams or departments have dedicated capabilities in their content systems and processes. Key line of business systems are integrated with content processes.

A new employee to a given function can be onboarded quickly due to familiar tools and terminology. For example a salesperson can create a proposal directly from the CRM system.
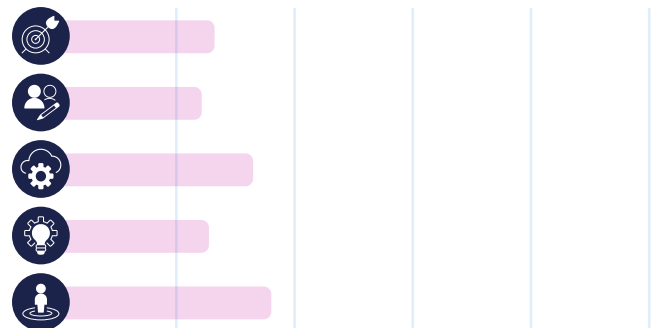
LEVEL 2
BEGINNER/INTERMEDIATE

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Automation is a benefit of M-Files — a very big one. The amount of manual work that users have managed to now bypass due to this has been fantastic. Our employees now spend their time doing better things.

Systems developer, professional services

Forrester Total Economic Impact™ study 2023 commissioned by M-Files

Recommendations

Progressing to level two is a great improvement in all the categories and will already show the benefits of investing in digital maturity. It also raises the appetite of many employees for greater levels of automation and alignment between businesses and functions.

To increase buy-in and adoption, it is recommended to showcase the difference between pockets of the organization that have not reached level two or go back in time before the first investments were made.

LEVEL 3
BEGINNER/INTERMEDIATE

Business aligned

Businesses have defined strategies for their own content, but they have not been aligned with IT and enterprise-wide systems.

On the positive side, the businesses know what they want and optimize their content processes. On an organizational level, there's duplication of effort from vendor evaluations and contract negotiations to project execution, enablement, and training. There are also overlapping systems, overspending and most likely information silos.

Governance team

IT and businesses have dedicated people who create information management policies and educate employees.

The governance team seeks to both create awareness for existing policies as well as listen to new needs. In case audits, the governance team plays an important role in the internal preparations.

Unified information model

The systems have a unified information model across functions and business units, sharing master data and allowing standardization of automations.

Leveraging master data reduces human errors and manual work and enables companywide analytics and insights.

## Automated workflows and permissions

Content related workflows and permissions are automated. Documents are not sent manually for reviews and permissions follow defined company policies. Compliance controls are embedded into the workflows.

These automations significantly improve the employee experience since they can focus on doing their work instead of trying to remember all the processes and policies. Consistency and accuracy of work is increased, and compliance related risks are reduced.

Industry specific capabilities

Document templates, processes and compliance controls are optimized to follow industry specific best practices. If the organization operates in multiple industries, each of the needs are addressed in systems.

Employees feel that their IT systems truly support their work. They have very little need to deviate from the guided workflows and templates provided to them and they are confident their industry regulations are followed.

M-Files®
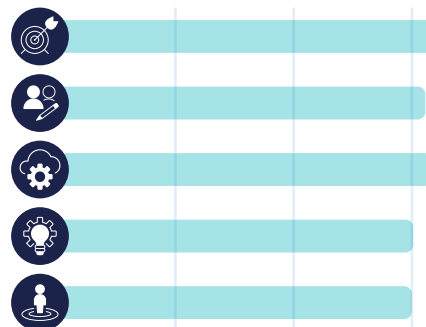
LEVEL 3
BEGINNER/INTERMEDIATE

Recommendations

In level three, the company is getting serious about their maturity. The systems are integrated and a governance team is spreading the word and implementing basic automations. End-users are satisfied with the tools they have.

The recommendation on level three is to leverage the momentum and keep going. Get IT and business decision makers on the same page to review both investments and returns and start talking about a more optimized company level approach. Look at each business, system and process to find synergies and the best ways to invest.

70% Better workflow efficiency *

Forrester Total Economic Impact™ study 2023 commissioned by M-Files

M-Files.

LEVEL 4
INTERMEDIATE/ADVANCED

IT and business aligned

IT and all business units are aligned on a common content strategy. The strategic importance of well managed information is understood as is the role of content systems and processes.

New needs are regularly evaluated together with IT and business units, and decisions optimize benefits for the whole organization.

Automated enforcement

The IT systems enforce governance rules for all new content. The governance team can leverage built-in rules and define more automations according to their business needs.

Governance efforts are mostly about understanding and implementing new needs as opposed to manual monitoring of compliance. Preparing for audits is a non-event since everything is in order automatically.

Automated information model

The information models are automated, ensuring that all content conforms to the standard.

All content is automatically classified and organized according to company policies. Employees find daily work easier since they don't need to worry about content governance details.

Automated external collaboration

Workflows, permissions and governance controls also extend to collaborating with external stakeholders. Content never leaves the company IT system, unless it is explicitly needed.

Employees can continue working normally even when the content collaboration occurs with people outside the company boundaries.

Manual personalization

The IT systems allow for personalization of daily workspaces by the end-users, without compromising any of the company processes.

While the systems provide perfect capabilities to perform their work, some users feel even more empowered if they can personalize the way they work.

LEVEL 4
INTERMEDIATE/ADVANCED

M-Files

Investing in increased automation capabilities:

Improves employee efficiency/productivity

BY 52%*

Forrester Consulting Thought Leadership Paper, March 2024 commissioned by M-Files

Recommendations

Reaching level four is a major accomplishment. The organization is highly effective and employees are empowered to work optimally. This translates into significant improvements in metrics across company dimensions.

The next step in the knowledge work automation journey is to make top leadership aware of the strategic importance of the work that has already been done and it's impact on company metrics. Only by getting the top leadership involved and excited, is it possible to move to the final level.

M-Files

LEVEL 5
ADVANCED

Executive involvement

The leadership team recognizes the strategic importance of content, aspires for greater levels of performance, and sponsors new efforts. The organization seeks significant competitive advantage from their approach.

The leadership team has a regular time allocation for reviewing content strategy and investment proposals. They have dedicated KPIs for content processes and have a clear understanding on how content KPIs contribute to business metrics.

AI assisted governance

AI assists in establishing and applying governance policies. This is particularly important for legacy data created before content governance was automated.

When establishing content processes, the governance teams get recommendations based on their data. They are also able to process legacy content repositories in the background to gradually bring historical content up to the same standard.

AI informed optimization

The systems leverage AI to recommend optimizations to support evolution of the business and data growth.

As new content is being created, AI can help detect the need for emerging content types or adding subcategories for types of content that are overrepresented in the current data, enhancing the ability to find content and draw business insights.

AI augmented automation

AI recommends additional actions, governance rules and metadata on top of the existing automations.

As the systems learn department, team and individual ways of working, further automations can be recommended to optimize overall performance of the content related business processes.

AI recommendations and personalization

The systems automatically adapt to the personalized needs of the end-users.

The more an individual uses the content systems, the more personalized experiences can be offered. A strong understanding of related people, processes and content drive recommendations to aid the user.

LEVEL 5
ADVANCED

Recommendations

Organizations on level five are leading in their industries through superior employee productivity and satisfaction. That translates into increased customer satisfaction, company growth and profitability. They have established the foundations to leverage AI in all areas of their information systems, content processes and knowledge work. They are constantly looking at new technologies and evaluating their potential to bring an even bigger lead against competition.

An average gain from implementing M-Files provides

294% ROI*

UNLEASH TECHNOLOGY

As organizations increase the maturity of their thinking, systems and processes, they are laying out the foundations for even greater future value with new technologies. Every maturity level brings tangible benefits and reaching the highest levels unlock value whose upper limit it is ever changing. Only organizations at the highest level can successfully harness the latest technologies and unlock their full value.

SCHEDULE A DEMO to learn how M-Files automates knowledge work.

M-Files.

The Smarter Way to Work.

M-Files is the leading platform for knowledge work automation.
With the M-Files platform, knowledge workers can find information
faster, work smarter, and achieve more. M-Files features an
innovative metadata-driven architecture, embedded workflow
engine, and advanced artificial intelligence. This enables customers
to eliminate information chaos, improve process efficiency, and
automate security and compliance.

For more information, visit **m-files.com**

M-Files has offices in eight countries.
To contact one of our regional offices, visit:
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