

# Digital Transformation

Creating work culture innovation with a Box implementation



Today's [SaaS applications](#) deliver tremendous value and fulfill a wide array of business needs, to the extent that 70% of today's organizations utilize at least one application in the cloud.

While SaaS applications simplify management and offer more predictable cost structures for IT with greater accessibility for users, they can underwhelm when not implemented carefully. Many business decision makers rush into SaaS projects expecting plug-and-play only to find there is often more than meets the eye to SaaS implementations.

Box, a leading cloud enterprise content management (ECM) application with whom AIM Consulting has a Partnership, is an example of a feature-rich SaaS provider that requires a concerted change management effort to drive adoption and achieve a successful implementation. Box has the potential to revolutionize worker productivity and drive high levels of efficiency, innovation and user satisfaction in an organization. But when implemented incorrectly or without a clear governance plan, user adoption can suffer, which directly impacts an organization's ability to achieve desired outcomes.

Regardless of the size or intent of your Box implementation project, here are some helpful guidelines for getting it right, as well as some tips for organizations who have already implemented Box but may need some help in making it successful:

## Clearly Define Usage Scenarios

Your company's employees likely use a multitude of file sharing and team collaboration tools, such as Dropbox, Google Drive, or Microsoft's OneDrive and SharePoint. In some cases, these tools are

unsanctioned (but, hey, users find a way), and other times they are sanctioned by default in the sense that the tool came with the licensing and is available for use, but is largely unattended by IT. Without sufficient forethought and planning, Box will merely sit alongside these tools, leading to confusion for users about which tool they are supposed to use for specific business tasks. Add to this a mind-boggling assortment of additional legacy ECM and FTP tools, records management systems, and legacy applications with native document storage on board, and that's a spaghetti bowl of solutions for users and managers to navigate.

## What to Consider

The time you spend up-front on these steps will save you orders of magnitude of time and headaches when you begin to implement Box.

Here are some specific suggestions:

### 1 Know your ECM landscape

Carefully inventory your library of ECM and file-sharing tools, noting where they are in your organization, who is using them, and how they're being used. Consider their importance to users and any security, identity and privacy concerns surrounding the data and geographical regions it might reside in, especially if outside the U.S. It's also important to solve for fringe use cases, like native-in-application document storage. Can Box Embed or Box APIs help secure data here? Review search capabilities and ease-of-use as well. How does Box fit in and compare with the rest of your landscape? What user processes may have to be modified? What will be gained?

Once you've defined the specific business use cases for Box in your organization, it's time to plan and perform your implementation.

### 2 Migrate legacy systems

Following implementation, migrate data from legacy ECM sources to prompt the move to Box. Communication is critical in this step. Make sure your employees know when these data migrations will

occur, and provide access rights in advance so they will experience a smooth transition to the new tool and procedures.

At this point, you'll begin to experience at scale the reduced management and cost savings your implementation was designed to provide.

### **3 Eliminate unsanctioned tools**

An implementation of Box is the perfect time to crack down on unsanctioned and rogue tool use. As Box meets the highest standards for data privacy and data security, it should be simple messaging that Box is not only more functional than alternatives, but is also more secure.

However, it is strongly recommended to implement Box within a larger company cloud or digital transformation strategy, including enabling tools like Single Sign On to make users want to use Box over alternatives vs. be told they have to use Box.

## Sell the Future Roadmap

Once you've deployed to your users and eliminated competition, reaffirm the benefits of having Box with regards to total cost of ownership and ease of future feature releases. Also, convey how Box adoption aligns with the future vision for the organization. You may even want to start doing this before the migration, so you start out of the gate with positive expectations as this message should resonate with both users and finance-sensitive executives.

### **What to Consider**

Consider future workflows, features and usage scenarios as much as possible. Keep in mind that your workers are a valuable source of information and innovation, so ask them how they anticipate using

Box and make sure you solve for their biggest needs. Here are some suggestions:

## **1 Champion the wonders of modern technology**

SaaS technology has come a long way and Box is at the top of the innovators stack, with a full set of tools and services that differentiate it from its competition, such as ease of collaborating with external users and feature-rich mobility.

Be an enthusiastic proponent of modernization as a means to drive efficiency, and use cutting edge features yourself, like scanning a whiteboard via Box Capture, managing team workflows with Box Relay, or delivering an executive presentation from a smartphone via Box Mobile. Embrace every opportunity for an impromptu demonstration of the transformative benefits at users' fingertips to avoid Box being labeled just another file repository.

## **2 Integrate third-party and productivity apps**

Enable turn-key features like Office 365 integration (Box has been a Microsoft partner since 2013) and third-party APIs (like Okta, Salesforce, DocuSign, etc.) to simplify workflow for your users. Communicate how to install and use productivity apps like Box Drive (or Box Sync), Box Notes and Box Edit. Proactively advise users when to use these add-ons, based on the usage scenario. Be sure not to leave these tools unmoderated, as it can lead to usability issues at scale.

## **3 Emphasize the benefits of simplified upgrades**

A major benefit of SaaS applications is their continual state of feature updates and product upgrades. While there are significant IT and business benefits for receiving a constant flow of improvements, it creates both challenges and opportunities for change management.

It's important to emphasize the wins associated with this simplified deployment process to management and users and to ensure that users are aware of the high-value features coming in

the future. Also, remind users and financial executives of the cost and complications of past legacy software upgrades, especially those on aging infrastructure. The elimination of those issues is easy to forget, but this benefit is tremendous and has readily demonstrable business value.

## Create a Culture of Efficiency

The digital workplace is evolving rapidly and organizations are capitalizing by enabling workers to collaborate in the Cloud in new and exciting ways. The more you enable and champion efficiency and innovation, the more value you get from your Box investment.

### What to Consider

Once you've implemented Box and everyone is on board with why you have it, it's vital to make it easier to use and to celebrate wins so that users learn from the innovations of other teams.

#### **1** Transform vs. Improve

Don't go for a culture of gradual improvement where users are given allowance to slowly investigate and adopt new features when they have time. The most successful companies take a transformational approach, utilizing ECM features to completely overhaul the way they communicate and collaborate with employees, customers, vendors, contractors, and sometimes even the public from the get-go.

Look for opportunities to transform from the current way of doing things. Box enables new ways to accomplish work, so don't limit the opportunity by viewing it as just a replacement file share tool.

For example, a globally disbursed team that hosted off-hour meetings to accommodate many time zones was able to



eliminate time wasted in repeat 'dial-in' meetings by moving to an entirely new process of hosting videos in Box of team announcements & highlights. File-level access stats were used to verify attendance, and collaboration tools were embraced to comment to the material as needed. Meeting costs were reduced and user satisfaction and collaboration were distinctly improved as users gained flexibility and control. This team didn't improve the process incrementally; they embraced modernization and transformed it.

## **2 Showcase team successes**

Communicate innovations and wins, highlighting what makes the specific new processes unique and efficient. Find a way to highlight (or possibly reward) the team or individual and really make the success stand out. When people and teams experience the productivity gains from using Box, especially in innovative ways, it generates more drive among users to create more of these wins. Modernization quickly becomes contagious if you show that it is valued and you demonstrate its effectiveness.

## **3 Adopt a two-staged training strategy**

Managers will value certain features differently than their staff. For example, managers will be interested in accessing content on the fly, streamlining approval processes, and receiving automated notifications for priority content. However, to get the most of these features, they need their staff to adopt Box. Because of this dynamic, it is suggested to target communications and even training to specific audiences, and ensure the buy-in of managers (as well as executives and executive assistants) first.

Once management is convinced, then you should focus on complementary features of Box for content authors and teams. These teammates will be more interested in real-time collaboration, editing in MS Office directly, and organizing their content. Also consider varying training based on department, as finance will have distinctly different document management use cases than marketing, or legal, for example. Again, don't assume box 'only does....' with a one-size fits all communication strategy or you will not only miss opportunities, but also limit adoption. If that happens, you won't even realize what you missed out on.

# Clear Vision Leads to Powerful Results

SaaS projects can be tricky. It doesn't matter if you move a significant portion of your users to Box if they aren't leveraging it in ways that bring efficiency and savings to your organization.

With proper attention, thoughtful planning, and emphasis on change management, your Box implementation can create a culture of innovation and process improvement in your organization. Empower users to change how they work, rather than just trying to encourage them to work faster, and your users will surprise you with creativity and solutions you could not have planned for in advance. Expect a cascading effect of increased adoption of additional tools and processes in your digital transformation journey and substantiate an unquestioned return on investment that transcends well past the cost savings from retiring file shares and servers.

## Need Help?

If you are new to Box, the terms and ideas here might be too unfamiliar to execute upon, or you might simply lack resources to manage a SaaS implementation. Consider the value of hiring an AIM Consultant with years of experience doing exactly this type of work to direct your SaaS project and facilitate change management. AIM Consulting has a dedicated practice area in Delivery Leadership, where experts with proven track records of mapping business needs to technology capability are deployed to ensure successful outcomes for clients. Whether you are implementing Box or have another technology-related challenge in which an individual expert or a whole team is needed, you can contact AIM Consulting for a free, no obligation consultation.



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