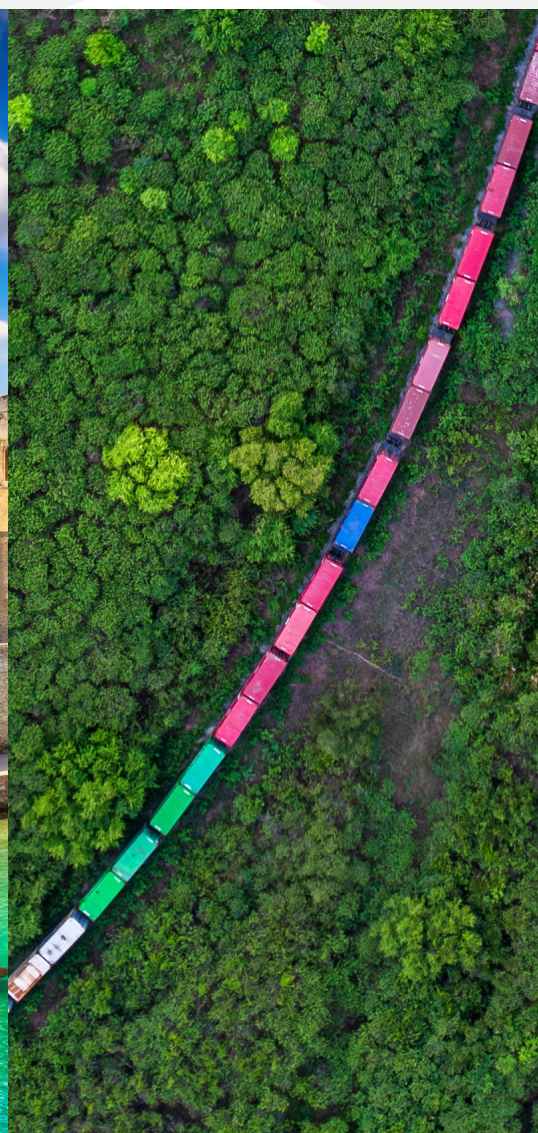**opentext**™

3 ways to elevate cloud content management

Real-life examples of big gains and bigger results across industries and use cases

Document management modernization

This global supplier of pharmacy and medical devices needed a document management solution that could handle massive amounts of data and documents. Their current on-premises content management solution was nearing the end of its life, and they knew they needed to modernize and simplify their documentation processes.

Top challenges

❌ Existing document management solution used for customer documents, projects, and product documentation nearing end of life.

❌ Manual document routing and workflows.

❌ Manual data extraction from financial documents (e.g., invoices), as well as customer and supplier documents.

Biggest gains

✓ **Cost savings:** Customer chose a solution that requires no customization.

✓ **Risk avoidance:** New content management solution meets all compliance needs while helping the customer prepare for future audits.

✓ **Time savings:** Replicating the existing folder structure from their legacy solution helped the customer quickly adapt to managing content in the cloud.

Why cloud content management for document modernization?

To meet their intensive document needs, this global medical supplier needed to pivot to cloud content management. OpenText™ Core Content Management delivered the speed and power they needed to spend less time searching disconnected applications and more time finding actionable information.

Other benefits of their solution included:

- Automated data extraction using OpenText™ Core Capture.

- Seamless integration with applications employees use daily (e.g., Docusign)using APIs to ensure fast time-to-value while minimizing disruption.

- Collaboration with OpenText™ Professional Services to ensure smooth implementation and migration.

Integrated data for better compliance and flexibility

This vacation rental company specializing in holiday rentals across Europe needed to replace their document archiving system. Their current solution was overly complex and their contract was about to expire. OpenText provided a simpler, more efficient solution that also ensured compliance with Swiss «LArch» law.

Top challenges

❌ Complex legacy solution.

❌ Intensive regulatory and compliance requirements.

❌ Siloed data and no central repository for archiving business data.

❌ Need to integrate with most-used tools, especially Salesforce.

Biggest gains

✔ **Improved customer service:** Instant access to contracts and customer information puts necessary information at agents' fingertips.

✔ **Increased transparency:** A full view of customer transaction history, including add-ons, helps agents understand customer needs.

✔ **Improved compliance:** Enforcement of retention periods ensures compliance with international rental regulations.

Why cloud content management for 360-degree customer data?

For this vacation rental company, the ability to connect its existing Salesforce© implementation to OpenText Core Content Management was critical. They wanted a SaaS solution that could provide robust IT support, faster time-to-value, and lower costs.

With OpenText, they got:

- A cost-effective solution without the complexity of their previous model.

- Fast implementation to meet their tight deadline.

- Increased focus for IT and admin teams to strategize instead of manage data.

- True 360-degree view of customer information and transaction history to enable them to better target future advertising to customer interests.

Transparent Salesforce integration

This transnational railroad moving essential goods across a 20,000-mile freight network needed a content management solution for its fragmented assembly of contract silos. Their critical requirement: a system that could integrate with their newly deployed Salesforce CRM. OpenText Core Content Management checked all the boxes.

Top challenges

❌ Sales team required fast, up-to-date access to customer documents.

❌ Contracts stored in silos, providing a fragmented view of customer data and documents.

❌ Business processes including contract updates delayed by poorly integrated content management solution.

Biggest gains

✔ **Improved service:** Streamlined operations empowered 300 sales users to effectively manage 7,000 customer contracts.

✔ **Seamless integration:** Made Salesforce metadata available for tagging customer documents and contracts.

✔ **Streamlined business processes:** By removing data silos and providing a centralized view of information, staff can efficiently collaborate on contracts.

Why cloud content management for sales?

For this transnational railroad, the need to consolidate data silos and provide a singular, accurate view of sales data was paramount.

That's why their team was thrilled to see how OpenText Core Content Management unified their data while also providing:

- Singular and accurate view of all sales data.
- Seamless, friction-free integration with Salesforce.
- Elimination of contract silos.
- Fast, easy deployment, and a SaaS solution that's always up to date.
- Notably rapid time to value.

Want to unlock productivity, integrate with the tools that matter, and secure your content with OpenText?

Learn more about the benefits of cloud content management

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