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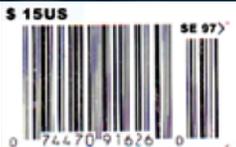
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## TECHNOLOGY SERVICES GROUP

DISRUPTING ECM WITH OPEN  
SOURCE AND THE CLOUD



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CIO REVIEW

**COVER STORY**



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# Technology Services Group

## Disrupting ECM with Open Source and the Cloud

**N**ovember 10, 2010 was a pivotal day for Technology Services Group. Founded exclusively as an ECM consulting specialist in 1996 out of Chicago, Technology Services Group (TSG) provides innovative software and services for a variety of ECM platforms. In 2010, about 70 percent of TSG's consulting services came from their Documentum practice.

"I remember coming into the office and Denise (office manager) telling me I had a fax from Documentum," says Dave Giordano, President and Founder, TSG. "I thought that was weird, I don't get faxes from anyone anymore."

As it turns out, the fax was terminating TSG's system integrator agreement after 14 years. Since 1996, TSG had grown up alongside Documentum, was recognized as one of the go to partners and had been coordinating the Midwest Documentum User Group for the past 12 years.

"We had a great and productive relationship with Documentum our first 7 years," says Giordano. "But as Documentum evolved from its early growth stage, TSG, like other Documentum partners, noticed a much more competitive sale driven culture that would aggressively compete for consulting services."

From the start, TSG has been building unique software products and solutions to augment their consulting services. TSG's unique approach provided low-cost open source products for common ECM components (Annotation, Migration, Search, Electronic Form and Case Management among others), while incenting clients to enhance and share their updates. More and more, an increasingly aggressive Documentum sales organization viewed both TSG products and services as competitive.

"As a Documentum partner, we had to walk a very fine line in regards to defending Documentum's products and services while promoting our products and services," says Giordano. "Our focus on clients' needs rarely made the Documentum sales representatives happy."



The terminating of the Documentum partnership turned out to be a blessing in disguise. When informed by Dave of the update, existing Documentum clients rallied around TSG and have continued to be clients seven years later. “I was dreading doing those client calls,” says Giordano. “All our clients not only pledged their support for TSG during this crisis but have strengthened their commitment to TSG and our products.”

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Free from any obligations to Documentum, TSG began openly promoting TSG products as well as creating the most successful independent blog on all things Documentum. TSG also deepened their partnership with Alfresco (and their founder John Newton, one of the original co-founders of Documentum). While maintaining all of their Documentum clients, TSG’s Alfresco practice now represents 65 percent of overall revenue. TSG has won awards from Alfresco each of the last five years including Customer Success in 2017 and Partner of the Year in 2015.

“In the early years of Documentum, TSG was one of our strongest and most innovative ECM partners,” says John Newton, current CTO of Alfresco. “When we started Alfresco, TSG was one of the first companies I contacted to add their skills and their software to the Alfresco ecosystem.”

While still supporting and expanding the Documentum client base, TSG also has seen expansion across Alfresco, Ephesoft, Hadoop and Amazon practices as well. After a record-setting year in 2016, TSG is on pace to continue to grow with over 10 million in revenue for 2017. “In 2017, we are seeing both migration from Legacy ECM solutions to the cloud as well as Infrastructure as a Service (IAAS) as the dominant cloud trends that are impacting our clients,” says Giordano. “As an Amazon Web Services consulting partner, we have been putting clients on AWS since 2011 and currently have 11 ECM clients on AWS with more and more clients moving every month.”

### Disrupting ECM with Open Source

“In providing ECM consulting services for our clients, we found that clients were asking us to build custom add-ons from scratch for common ECM capabilities,” says George Steimer, OpenContent Product Manager and 18 year veteran at TSG. “By investing in common, easily configurable and supported software products, TSG was able to provide a free jump start for our clients that could be implemented in a shorter time frame rather than custom solutions or expensive ECM vendor proprietary components.”

Initially, TSG chose the standard software sales/maintenance model for their software. Like most software companies, selling

software and services affected client relationships as the clients were frustrated with any perceived product deficiencies. By embracing an Open Source approach for clients, TSG pivoted to offer all of their products free to clients to focus on good client relationships.

“Prospective clients are often taken aback when they ask for pricing and I say we offer all products free to clients as part of a consulting engagement,” says Steimer. “When clients ask if we are a consulting firm or a software company, I usually reply that we are a consulting firm with great software that we bring along free to our consulting clients.”

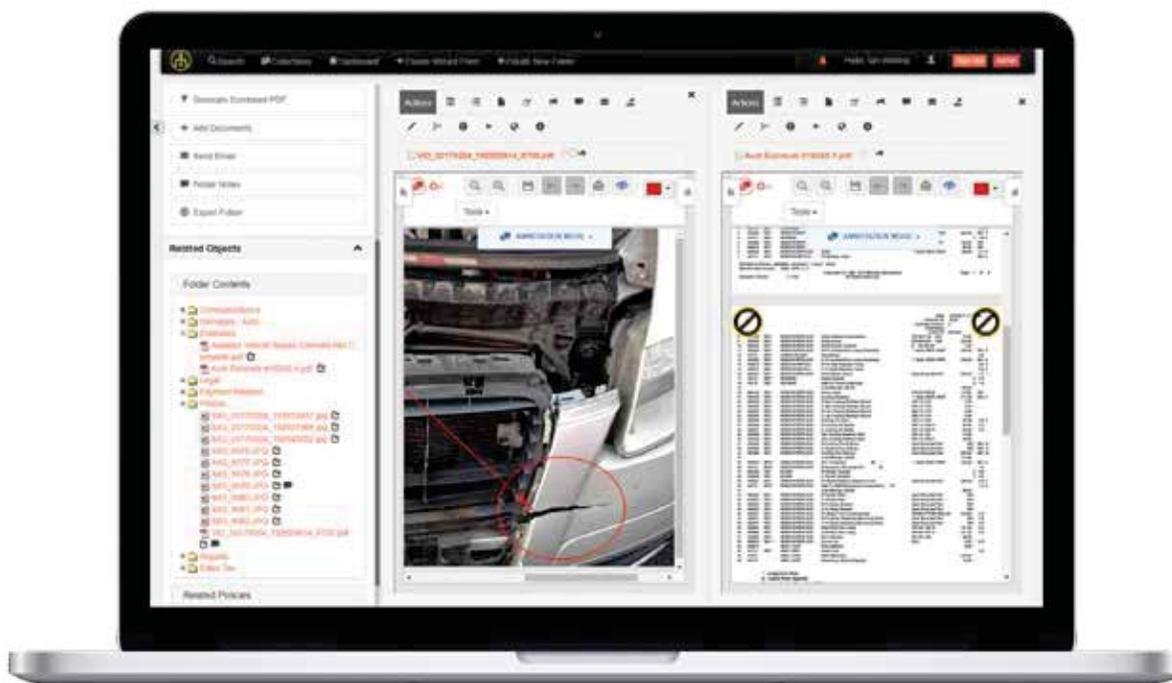
Being a consulting firm has some unique impacts on the software product direction. Rather than be frustrated with any gaps in requirements, clients are encouraged to add the requirements to the consulting agreement so that the new capabilities become part of the product. In this manner, new capabilities are often vetted by what is important enough for clients to fund rather than based on sales or marketing input as with traditional software development. Clients have direct input and share (with support) product enhancements.

Key to TSG’s product success is the foundation layer of the OpenContent REST Web Services isolation layer between their application software (ex: Search, Case, Annotate) and the backend ECM solution (Documentum, Alfresco or Hadoop). By building solutions on OpenContent, clients on any ECM platform can share and enhance the solution for all clients. One example of great client contributions is OpenAnnotate. Developed in 2013 with a client that wanted a lightweight alternative to Adobe Acrobat, OpenAnnotate began as a browser based PDF Annotation tool that could only do comment annotations. Clients embraced the low-cost browser alternative and have added all supported Adobe annotation types

TSG Software Products	
OpenContent Web Services	REST Web Services layer isolating interfaces from ECM Repository
OpenContent Search	Configurable browser based search and retrieval
OpenContent Case	Smart foldering for case management applications
OpenContent Forms	Form and Workflow
OpenAnnotate	Browser based PDF Viewing, Annotation and Redaction
OpenOverlay	PDF Overlays and Watermarking
OpenMigrate	Configurable high speed ECM migration, synchronization and publishing

### Legacy ECM Migration

Many of the clients TSG works with are struggling with Legacy ECM implementations that, while innovative in their day, have become costly, unstable and difficult to maintain and enhance. CIOs would like to not only move these applications to the cloud, but also break away from proprietary interfaces. TSG addresses movement to the cloud by providing OpenMigrate adaptors for most legacy ECM systems. As a services firm, TSG assists in all of the migration activities including the migration of content, interfaces and integrations for the legacy ECM system.



TSG's clients are mostly Fortune 500, but also include innovative smaller companies. One current trend around digital transformation involves large and small insurance clients that need robust case management for claim and policy systems. One great example of a very successful TSG client is New York Property Insurance Underwriters Association (NYPIUA) where TSG was able to migrate from a legacy ECM solution to a more modern Alfresco repository with a modern OpenContent interface.

"In less than two weeks our people were telling me that this was a great system and easy to use," says Dane Austin, President NYPIUA. "I have been around a long time and I have never had people come around that quickly."

### Build versus Buy Culture

While a small company, TSG has large company roots with the first ten employees being veterans from Andersen Consulting (now Accenture). "When we first started in 1996, we wanted to keep all of the good things about Andersen like mentoring and training but on a smaller scale," says Ellen Ryan, a 21 year TSG project manager and Life Sciences practice lead. "With a focus on training, we began recruiting from colleges back in 1998 and since then over 85 percent of our hires have been directly out of college."

By focusing on training and college hires, TSG can provide consistent resources across multiple year client engagements with a challenging career path and fun working environment for employees. "Like our software products, we want to build our people," says Ryan. "Everyone has input into what is best for our people's career development including the types of projects we sell and how those projects are staffed. After initial requirements gathering, most of our ongoing project work is done back in our offices and we try to keep the environment fun and collaborative."

support or surge development.

"New clients will sometimes ask for only the most experienced resources for their project. But does it really make sense for a senior technical architect to be doing testing or development?" says Ryan. "By keeping multiple resources at different affordable rates on a project combined with the jump-start and consistency of our software products, we can provide clients quality results without the typical cost and duration of a large team of expensive consultants working on proprietary products."



Since partnering with Alfresco in 2006, we have successfully migrated a wide range of customers in a variety of industries from legacy ECM implementations

Clients, used to the traditional consulting or contracting firm, can sometimes struggle with understanding the TSG approach. TSG will often staff project managers across multiple projects and rarely full-time on any given client. By supporting multiple clients, managers are able to share client experience across clients as well as be available and prepared when clients need immediate production

### Looking Forward for ECM

When asked about the future of ECM, Giordano is forecasting more disruption in the short-term. "We are already seeing the effect of open source and the cloud at most of our ECM clients," says Giordano. "The capabilities and cost efficiencies of Amazon Web Services and other IAAS vendors finally have clients looking to move away from their on-premise ECM environments with cost-effective cloud infrastructure and open source. The ECM software and services firms that are able to capitalize on this shift and disruption will be the ones that can best partner with the IAAS vendors. With our people, software investments and partnerships, TSG is well positioned to thrive in this new environment." Given an unknown future, would Giordano see TSG once again partnering with Documentum. "It is difficult to see the legacy ECM suite vendors leading the coming disruption given the innovator's dilemma," says Giordano. "But we did see Documentum going to OpenText better than staying at Dell and if 25 years in ECM has taught me anything it is that you can never say never." 

