

# Document Intelligence for the Age of Enterprise AI

*The Missing Link to Trusted AI*

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**Topic:** Document Intelligence

**Issues:** How will enterprises put Document Intelligence to work to gain a competitive advantage?

How will the Document Intelligence market evolve?

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## SUMMARY

The enterprise landscape is rapidly shifting from basic Content AI to a more advanced era of Document Intelligence. To remain competitive, organizations must adopt an intelligence layer that is specifically designed to comprehend and leverage the vast amounts of information currently locked inside of documents. However, this push for intelligent content is not without significant enterprise security concerns, particularly regarding the risks of moving sensitive documents to external AI services. This research note will provide an overview of this emerging category and how it differs from traditional AI Agents. Enterprises will learn how to deploy Document Intelligence to allow frictionless information access, generate trusted knowledge through document understanding, and ensure data privacy.

### Key Findings:

**Prediction:** By YE 2029, 60% of enterprises will leverage document intelligence to unlock critical business insights and accelerate revenue-generating operations (70% probability).

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## Introduction

Enterprises are growing frustrated with the inadequacies of ECM and related document management solutions (see Note 1). While content analytics and Content AI have begun to address some of these pain points—particularly the ability to quickly pull knowledge from and provide analytics for the information inside of documents—the velocity at which new information is being generated in the enterprise demands more than extraction and retrieval. Thanks to advances in generative AI, Document Intelligence is evolving beyond its traditional focus of extracting and structuring content for machine-based processing. This evolution is transforming how organizations understand and interact with unstructured data and how they safeguard their intellectual property in the age of generative AI.

Document Intelligence will deploy an Intelligent Layer to enterprise content where it currently lives. Powered by LLMs, it will enable insights from multiple data types (text, image, video, and more), and will provide secure spaces for teams to collaborate, all while prioritizing data privacy. Thanks to its ability to not just search for information but to comprehend it in context, Document Intelligence will give AI agents a trusted knowledge base to source as well, thereby building trust with human employees. This research note will provide an overview of how Document Intelligence is evolving and will give guidance on how buyers should evaluate potential solutions for their enterprise.

## How Content AI Has Changed: Moving Toward Document Intelligence

Historically, enterprises have had to manually search through the information locked inside their content by using keywords—which had to be properly indexed—and basic search functions. This soon proved to be inadequate in the information age, and advances in machine learning gave rise to Content AI. Content AI can ingest information in a deeper way than simple search and offers analytics, which has allowed enterprises to automate knowledge extraction across their documents.

### Note 1: Why the ECM Market has Failed

Enterprise Content Management (ECM) systems were designed as digital filing cabinets—systems of record for archiving and compliance. Information storage is a necessary function of keeping data safeguarded, but the problem is, sorting through this information without any kind of intelligent system is at worst impossible and at best painstaking and time-consuming, with no reliable guarantee of desired results. Even if the information is found, there is nothing to govern its reliability—whether it is outdated, out of compliance, incomplete, etc.

While legacy providers excel at managing content, until now, they have failed to modernize their systems, thereby leaving knowledge locked inside this content. Enterprises are frustrated. This oversight has paved the way for a new solution to emerge, in the form of Document Intelligence.

However, Content AI is limited in its current form. Enterprise leaders want to be able to interact with the information inside their documents, use it to generate new insights, and automate their complex workflows. Powered by Large Language Models (LLMs), Document Intelligence addresses all of these needs. By leveraging AI agents that use the trusted knowledge it sources, it can perform tasks autonomously. This new category represents a major shift: one from a passive relationship with knowledge to a dynamic, agentic one.

### Why Traditional AI Is No Longer Enough

For Content AI to truly mature into Document Intelligence, what's needed is an "Intelligence Layer" that will sit on top of content repositories. The Intelligence Layer is at the core architecture of Document Intelligence and will take the knowledge locked inside static documents and turn it into dynamic, actionable assets.

While it's true that enterprises are already using traditional AI agents to eliminate tedious, document-based tasks and assist with knowledge recall, traditional AI agents are limited by the static information they're working with. They can only respond to queries within the bounds of this information—even if that information is outdated, incorrect, incomplete, or worse, non-compliant. The difference with Document Intelligence is that it enables active content understanding to generate grounded, trusted knowledge acting as a form of governance. These AI agents can then use that trusted knowledge to execute business processes.

### How the Intelligence Layer Will Transform Document Processes

A Document Intelligence Platform is an enterprise software layer that transforms documents into trusted, governed, and reusable knowledge for people, applications, and AI agents. If ECM is for storing documents, search is for finding documents, and generic LLMs are for generating responses, then Document Intelligence is the transformative layer that comprehends, grounds, and activates document knowledge. Its Intelligence Layer is what brings advanced AI processing directly to where content lives, enabling a new class of capabilities. Let's examine the two foundational capabilities of this intelligence layer:

- **Advancing Beyond Basic Analytics to Insight Discovery Across Diverse Document Elements:** Content AI has traditionally been confined to text only. The Intelligence Layer of Document Intelligence goes beyond basic document search and keyword extraction to understanding relationships across audio, images, text, tables, video, and other document elements. Employees are empowered to ask complex, conversational questions of their entire content library thanks to deep reasoning, and will instantaneously receive a precise, easy-to-understand answer.

- The Role of Precise Citations in Validating AI-Generated Insights:** A major drawback of AI—without the proper guardrails—is inaccurate, outdated, or hallucinated information. Enterprise users want to be able to trust the answers an AI agent produces. The Intelligent Layer acts as a layer of validation in this process. It will provide citations to the knowledge generated, linking it back to its sources in the original document to build trust with its users.

See Figure 1 for an overview of Document Intelligence.

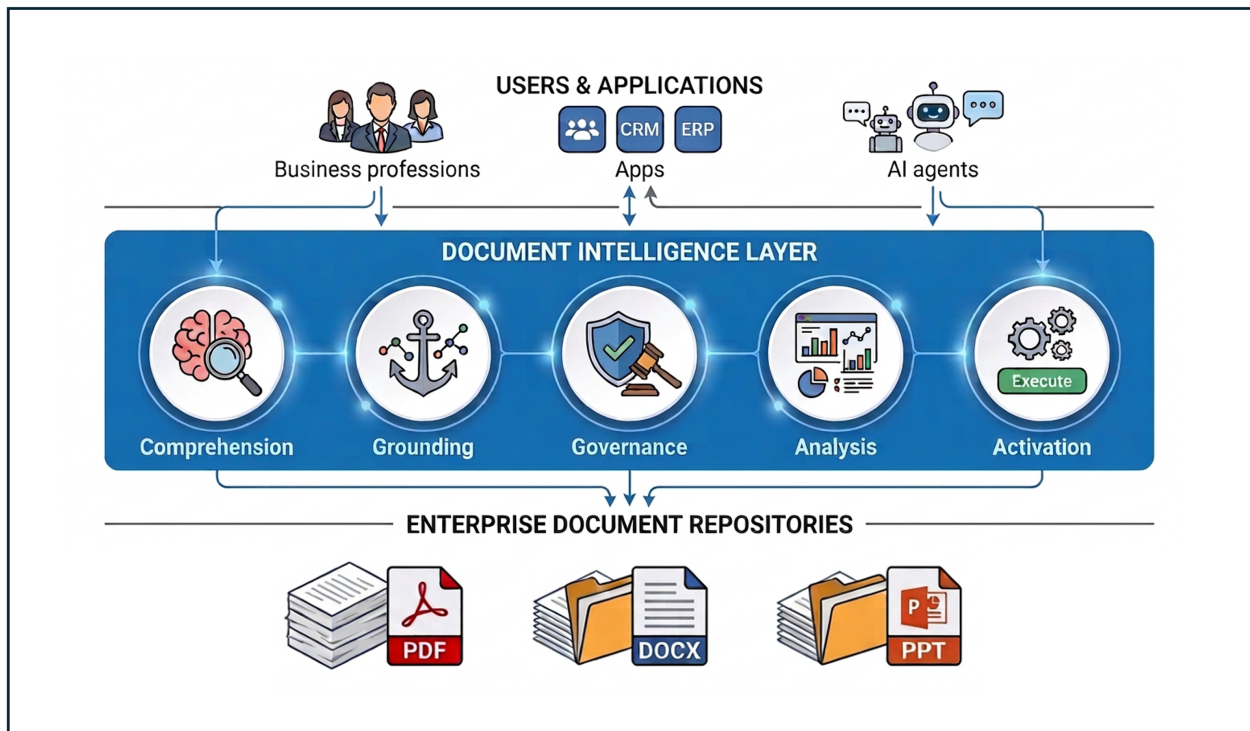


Figure 1: Document Intelligence is poised to play an increased role in the enterprise.

### Why Enterprises Will Flock to Document Intelligence

Aragon has identified five major trends that are spurring enterprises to seek Document Intelligence for their important document processes.

- 1. The Accelerating Need for Actionable Enterprise Information, and the IP Risks of Generative AI:** Enterprises need to mine their knowledge at high speeds to stay competitive—whether that's to execute a contract, create marketing deliverables, or ensure compliance. While traditional AI has had nearly ubiquitous adoption, it's limited by the fact that it cannot generate new information, so enterprises have turned to Generative AI. Viewed as the panacea to all productivity issues, generative AI can spit out content within seconds

or minutes—content that previously took days or weeks to produce, saving human employees hours and hours of time. The problem is that these solutions are not without significant legal risks. *The General Counsel Report 2025*, a survey conducted by FTI Technology, found that 85% of general counsel are “minimally” or “not at all prepared” for the IP risks that will arise from using generative AI<sup>1</sup>. Because Document Intelligence can understand the information locked inside documents where it lives in its secure location in the enterprise, it can generate insights that both employees and AI agents then use to execute business processes without compromising sensitive IP.

2. **The Trap: Key Information Is Locked Inside Unstructured Documents:** Until now, the vast majority of unstructured data contained inside presentations, media files, and other document types has been largely unusable, thanks to legacy systems. The opportunity cost of letting this data remain dark can result in inaccurate or missing data, missed revenue opportunities, and overlooked legal risks. Document Intelligence can comprehend this data in context to identify, prevent, and rectify critical gaps in trusted knowledge.
3. **The Failure of Legacy Content Providers in ECM, CLM, and WCA:** While basic storage and retrieval are an essential part of content processes, these capabilities alone are far from meeting the needs of the modern enterprise. Many legacy providers in ECM, contract lifecycle management, and workflow and content automation (WCA) have failed to innovate when it comes to advances in AI. Aragon reported that WCA providers who do not adopt an intelligence layer by 2027 are at risk of “being demoted to simple, passive storage repositories.”<sup>2</sup> The enterprise content management market as a whole is undergoing a major upheaval, with some analysts and consulting firms in recent years even opting to get rid of the term ‘enterprise content management’ completely in favor of terms like content or document services. Aragon, however, sees this not as a moment of terminology rebranding, but as a total transformation of what a modern content platform needs to offer to enterprises<sup>3</sup>.
4. **Document Intelligence Powers High Performance:** The ability to glean insights from enormous amounts of static documents will transform how fast businesses are able to move. Enterprises will see a drastic reduction in the time spent creating and reviewing content, with the added bonus of reducing risks. With both human and AI agents using the trusted knowledge generated by Document Intelligence, enterprises can build better trust among humans and AI agents to move faster and perform better.
5. **Evaluating Document Intelligence Against the Traditional Content Lifecycle:** Left on its own, the traditional content lifecycle is slow. Documents are created, stored, and later searched—maybe summarized or analyzed with Content AI if they’re lucky. With Document Intelligence, the actionable insights and trusted knowledge gleaned from an enterprise’s content repository can be utilized by AI agents to automate document lifecycles with exceptional accuracy, ensuring adherence to strict corporate governance and regulatory compliance frameworks, while also automating and creating faster than ever before. Document Intelligence will go hand-in-hand with an enterprise’s use of agentic AI.

<sup>1</sup> FTI Technology, *The General Counsel Report 2025*.

<sup>2</sup> Aragon Research, *The Aragon Research Globe for Workflow and Content Automation*, 2026.

<sup>3</sup> Aragon Research, *Enterprise Content Management Is Dead. Long Live Intelligent ECM*.

## Document Intelligence Will Not Rely on Frontier AI Providers: Why Security Must Be Front and Center

As enterprises look to integrate intelligence into their document workflows, security needs to be top of mind. There are two major prongs to consider on this front:

- **Evaluating General-Purpose AI Services for Sensitive Workflows:** While large-scale general-purpose AI services have democratized access to advanced models, using public third-party cloud platforms for sensitive document processing introduces distinct operational and security considerations. Enterprises must rigorously evaluate how data is handled and retained, whether customer content is used for model training, and if the platform fulfills strict requirements around permissions, data residency, governance, auditability, and intellectual property protection. Relying on external, public-facing services without these granular controls can expose proprietary content to unnecessary risk.
- **The Necessity of a Security Model That Keeps Documents Contained:** A dedicated Document Intelligence Platform addresses these risks by deploying its intelligence layer directly within the secure environment where an enterprise's content already resides. Enterprises should look for platforms that run within their own cloud instance or virtual private cloud (VPC), ensuring sensitive data never leaves its designated boundary. Modern Document Intelligence platforms also incorporate specialized AI security agents capable of detecting high-risk content and blocking unauthorized access "in-flight" before a transaction takes place, delivering a proactive layer of protection built specifically for enterprise content.

## How a Document AI Assistant Will Transform Information Processing in the Enterprise

After deploying a Document Intelligence Platform, knowledge workers will interact with the platform via the Document AI Assistant. These Document AI Assistants will be able to orchestrate and execute highly complex business tasks. By embedding the AI assistant directly into workflows, employees can use a conversational or voice-enabled interface to search for, summarize, create, and reason with content wherever they are already working to eliminate context switching and boost productivity.

Secure collaboration will be enabled through features such as a sandboxed container (e.g. PDF Spaces), which will give teams the freedom to work together on sensitive or confidential content.

## The Need for a Modern Document Intelligence Platform

Document Intelligence will explode in adoption because it will meet both the enterprise's current and future needs. Business leaders know that traditional ECM has long been archaic, but going the frontier AI provider route is risky given the security concerns. A Document Intelligence Platform will allow enterprises to work within their current systems—wherever content is currently created and used, like AI operating at the edge.

Its superpower is not only unlocking knowledge and delivering actionable insights within static documents; it also reduces friction, improves productivity, and enhances security—all while reducing latency and cost.

**Prediction:** *By YE 2029, 60% of enterprises will leverage document intelligence to unlock critical business insights and accelerate revenue-generating operations (70% probability).*

Adopting a Document Intelligence Platform will help enterprises prepare to adopt additional transformative technologies such as Agentic Systems, where multiple AI agents collaborate to automate complex, multi-step business processes, transforming how work gets done. Adobe is a Document Intelligence Platform provider that is offering these cutting-edge capabilities (see Notes 2 and 3).

## Leveraging Document Intelligence for Your Industry

Enterprises across diverse industries will benefit from adopting Document Intelligence. Below, we've explored potential ways it could and will be applied in five major industries.

**Energy:** Energy companies are beholden to strict government and industry regulations when it comes to conducting business. Document Intelligence can help them move faster, safer, and with less risk.

For example, an energy company could use Document Intelligence to review all documents associated with an upcoming compliance deadline and map those requirements to all current site, deal,

### Note 2: Adobe Corporate Overview

Adobe is one of the leaders in Content Creation, Content Experience, and Document Intelligence.

**Location:** San Jose, California

**CEO:** Shantanu Narayen

**Availability:** Available now

**Website:** [adobe.com](https://adobe.com)

### Note 3: Adobe Acrobat's Strategic Positioning

**Acrobat Studio** is Adobe's platform for trusted document work, spanning everyday productivity through enterprise document intelligence. It brings together Acrobat's PDF capabilities, AI Assistant, PDF Spaces, Adobe Express, and new enterprise intelligence capabilities in a unified environment.

**AI Assistant** helps knowledge workers understand and act on documents through conversational experiences, enabling them to quickly find information, generate insights, and receive responses grounded in source content.

**PDF Spaces** extends document intelligence into collaborative, multi-document environments. Teams can bring together information from multiple sources, work with customizable AI Assistants, generate recommendations, and share findings through interactive experiences.

**Knowledge Base** enables users to ask questions across large, curated document collections and receive answers grounded in citations back to source content.

**Analyzer** transforms complex documents into structured, auditable data that can be used in downstream business processes and systems.

Together, these capabilities enable **Acrobat Studio** to extend from everyday document productivity to enterprise intelligence—helping people and organizations understand, analyze, and act on trusted information across their documents.

and/or project documents to ensure they are current with new regulations.

**Financial Services:** Thousands of customers put enormous trust in their financial services providers, and with this trust comes a responsibility to be adaptive, extremely responsive, and sensitive to evolving needs. Leveraging Document Intelligence, Financial Services organizations can extract information faster than ever before from their static documents, validate that the information is correct, and analyze it to create personalized content experiences that are specifically tailored to a customer's needs.

Document Intelligence will save human employees time when it comes to underwriting, credit lending, investment operations, and more, allowing them to get answers for their customers faster. A major use case will also be in fraud prevention, as Document Intelligence will enable the validation of information and terms across disparate documents and document types.

**Government:** Governmental organizations are often burdened with legacy systems, which can create significant manual labor and effort. By using Document Intelligence, government organizations will now be able to extract important data from sensitive documents instantaneously without compromising security in both classified and unclassified environments. The secure collaboration features will ensure that only authorized users have access to the data and that it is not being shared outside of its scope.

**Healthcare:** Managing huge volumes of both structured and unstructured data that is often tied to legacy content systems has kept most healthcare documents dark. With Document Intelligence, organizations will not have to worry about where the data is being stored; it is already in a secure environment that meets regulatory requirements.

Document Intelligence can do things like extract diagnoses, medications, procedures, etc., from disparate clinical records, saving workers precious time when it comes to building reports for either clinical, legal, or research purposes. It can also do things like analyze documents to determine whether the proper documentation for certain authorizations has been met, allowing for faster approval cycles.

**Manufacturing:** Manufacturers are tasked with bringing myriad documents and information into every single business decision, and that data is often fragmented. The stakes are high, as physical processes often have strict safety and regulatory requirements. By using Document Intelligence, for example, manufacturers can generate insights from their engineering documents to assess what revisions might be required on an existing project, or how to improve worker safety on procedures or environments that already exist.

They can use Document Intelligence for something like analyzing the certifications, audits, and quality reports from their suppliers, allowing them to spot gaps in requirements, lapsed dates, and more, to mitigate risks.

## How to Get Started with Document Intelligence: Evaluating Providers Based on Five Essential Capabilities

Document Intelligence will eradicate the era of passive content storage. It will go beyond generic AI and will provide the benefits of generative AI without the IP risks. The time to adopt is now. Enterprises should first evaluate their current providers to determine whether or not Document Intelligence is offered, or if a roadmap will be provided.

It will be important to discern the offer of *any* AI capabilities from true Document Intelligence. Enterprises should understand the five major capabilities to identify providers whose platforms meet each requirement. See the criteria below, and the summary in Figure 2.

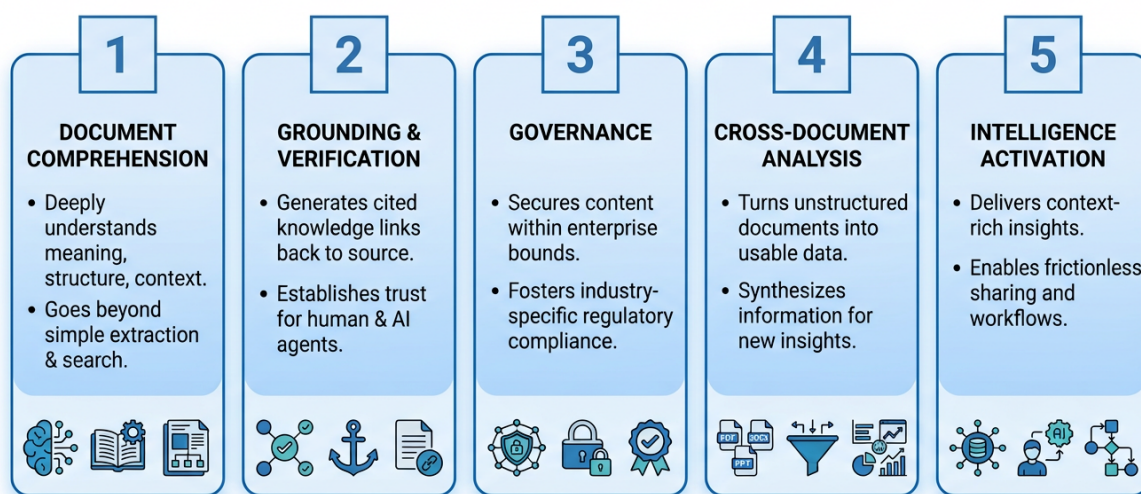


Figure 2: The five evaluation criteria for Document Intelligence.

1. **Document Comprehension:** Document Intelligence goes beyond text extraction and search to understand and comprehend the meaning, structure, and context of information within and across document elements.
2. **Grounding and Verification:** Leveraging its comprehension, Document Intelligence generates knowledge that links back to the source so that all information is cited and verified. This feature is critical in establishing and maintaining trust to ensure that both human and AI agents have what they need to complete their work and execute business processes.
3. **Governance:** By deploying the Intelligence Layer where content already lives, enterprise information does not go out of bounds. Collaboration should be enabled through secure spaces to allow teams the freedom to share and work on sensitive documents. Enterprises should ensure that the Document Intelligence provider meets or fosters the regulatory or compliance requirements for their specific industry.

4. **Cross-Document Analysis:** High volumes of unstructured documents can be turned into usable data that powers business processes and workflows. It can synthesize information understood across documents to generate new insights.
5. **Intelligence Activation:** New insights generated are then delivered to people, agents, and workflows in the context of where they live/work to enable frictionless sharing, allowing people and processes to move faster.

### **Aragon Advisory**

- Ask your current content/document management provider if they have a roadmap for an Intelligence Layer to overcome legacy failures. If they do not, expand your list of providers to evaluate.
- Prioritize Document Intelligence providers that limit the rise of IP exposure.
- Demand verifiable and collaborative AI features to govern information safely and effectively.

### **Bottom Line**

The transition to Document Intelligence is not just about extracting and understanding information from documents; it is a critical driver for high business performance going forward. Employees need easier, faster, and more secure access to the information required to do their jobs without having to spend hours searching for the right source. AI Agents, too, need a continuous source of trusted knowledge to execute business tasks, as they cannot independently create trusted, grounded knowledge. As enterprises look to unlock the value of their unstructured data that legacy providers failed to surface, they must balance the demand for insight discovery across document elements and types with strict security requirements. Adopting a Document Intelligence platform will make the enterprise's document knowledge usable and trustworthy for both people and agents.