

## Top Five Tactical Content Management Actions to Consider in 2009

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Gartner inquiries with clients show that many organizations, especially in today's challenging economic times, struggle with how to do content management without the "E" or with where to start on the road to enterprise content management (ECM). IT leaders and planners can use this note to identify tactical content management that can have an immediate impact and benefits in 2009.

### Key Findings

- Many enterprises still struggle to achieve the promised benefits from existing investments in ECM.
- Organizations need to strike a balance between cost optimization and being able to grow and transform the business.

### Recommendations

- Apply an ECM maturity model analysis to help assess priorities together with related effort.
- Concentrate on smaller applications that give greatest value.
- Be results driven: maintain focus on the desired outcome of the content management initiatives and ensure this outcome is expressed in the context of key business objectives.

## ANALYSIS

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Respondents to Gartner's annual survey of CIOs indicated that their top three business priorities for 2009 were: improving business processes, reducing enterprise costs and improving enterprise workforce effectiveness. Attracting and retaining new customers was their number four priority, while targeting customers and markets more effectively rose from number nine in 2008 to the number seven spot for 2009. ECM cannot only help organizations meet these priorities but in some cases is vital to the core achievement itself. Yet, an effect of the current economic situation is the decrease in available funds for larger, strategic initiatives together with an increase in the aversion to the risk associated with any such costs. In 2009, Gartner expects that fewer clients will be implementing large content management deployments or focusing on building out a content management infrastructure. However, that does not mean there is no value in tackling content management projects. What is required is a clear focus on tactical actions that can bring modest to significant benefits. Here are five tactical approaches you can focus on related to content management that will have an impact in 2009. Enterprises who are at the stage of operating existing systems can find quick value in the first four.

### 1. Stop Using Your E-Mail System as Your Document Management System

How do I manage the growth of my internal business content if I cannot afford a full ECM suite or if I do not have a large number of users and complex processes? Basic content services (BCS) offerings like SharePoint, Lotus Quickr or Xerox DocuShare enable organizations to provide quick benefits without the expense and complexity of a full-scale ECM suite. Consider open source alternatives, such as Alfresco, Nuxeo or Magnolia (some examples, not an exhaustive list) for departmental deployments as well. Many organizations that Gartner has spoken with report using their e-mail system for document routing and storage, resulting in an overload on e-mail servers and an inability to ensure that people are working with the latest document. Leverage BCS as a secure repository rather than relying on e-mail as a substitute for content management. Moving content from file shares into a BCS repository gives organizations greater control over their content assets. It ensures users can find content they need to do their jobs and ensure that is the right version. BCS is also one of the platforms available to facilitate informal project coordination. It also enables the formation of ad hoc teams, by supporting user-created workspaces that can be set up, given privileges and removed quickly with little or no IT involvement, allowing companies to respond quickly to changing market conditions.

Primary benefits:

- Storage costs will rise more slowly as links to documents are distributed instead of full-document attachments.
- Increase the effectiveness of project management and reduce project risk by centralizing storage of related content in suitable virtual project "rooms."

### 2. Take Paper Out of the Process

How do I leverage ECM to cut costs or support green initiatives? Eliminating paper provides hard dollar savings, especially if you also leverage workflow to drive efficiency in your processes. Even pure image storage and retrieval applications can provide a quick return on investment by eliminating or reducing physical storage requirements and distribution costs. Converting paper documents into digital format and making them accessible via a Web site can eliminate or reduce the costs of printing, shipping, postage and faxing. Do not get distracted by the cost and effort of

converting rooms full of existing paper documents, rather start your imaging efforts on a go-forward basis. Use electronic forms (e-forms) to capture content electronically instead of via paper forms. E-forms can also greatly reduce processing time, keep printing costs down and increase the accuracy of data entry, so work does not have to be checked or done twice.

Primary benefits:

- Converting your most labor-intensive, paper-based processes to an electronic equivalent that measurably increases productivity.
- Converting your "accounts payable" processes to an electronic workflow can allow procurement to optimize payment of invoices more accurately.
- Converting your "accounts receivable" processes can also be achieved near term and can help you achieve better control over payments that may be payable by companies in financial difficulty. This measure can therefore help reduce bad debts.

### **3. Use Content Management to Retain Users/Customers**

How do I maintain my brand and retain my customers, given lower advertising budgets and marketing resources? The potential for Web content management (WCM) solutions to contribute significantly to key business advantages is high. Use WCM to make your Web sites more engaging and appealing, thereby helping to retain existing and attract new customers. It is all about the "first impression." Engaging customers with more-dynamic content has enormous revenue implications. A fresh cultural shift now focuses on the myriad possibilities of using the Web as a medium for rich interaction with well-targeted audiences and market segments. The Web is an excellent medium with which to innovate, measure, analyze and improve. Leverage your WCM system as a more efficient delivery mechanism, both internally and externally, for digital media.

Primary benefits:

- Low investment in high-quality products is now a feasible strategy to exact higher and quicker returns from achieving the right WCM solution.
- WCM marketing solutions can increase effectiveness of marketing despite likely cuts in that area.

### **4. Federate Multiple Content Management Applications**

I need to access content that may be stored in multiple content repositories, but struggle with the costs, complexity and feasibility of consolidating those repositories and content applications down to one or fewer strategic vendors. While Gartner still recommends consolidation as a long-term strategy, federation can be a viable short-term approach. Instead of buying and deploying custom connectors, consider federating multiple repositories via enterprise search, or on the glass (portal, mashups). Personal pages that combine portlets and deliver "apparent integration" of disparate information from various sources on the glass has been a very common contribution and consumption mechanism. Mashups make sense where users cannot wait for developers to create a formal application or where the audience is too small to attract developers. Enterprise mashups that integrate content with business application data remain rudimentary compared with the explosion of consumer mashups.

Primary benefits:

- Reduce the costs of creating or purchasing custom connectors.

- Serves as a tactical, short-term option while allowing organizations to develop a strategic plan and business case for consolidating content repositories and applications over time.

## 5. Consider a Hosted or SaaS Solution for Tactical Deployments

I have immediate, tactical needs for content management, but how can I get it up and running quickly without having a large budget or in-house IT resources? Consider going with a hosted service (Xerox, Hyland, Perceptive or Iron Mountain, to name a few) or software as a service (SaaS)-based model for acquiring content technologies. This makes sense for large organizations who need a tactical or short-term option while evaluating vendors or preparing for a procurement. Use SaaS (SpringCM, IntraLinks, NetDocuments or IPSA are just a few examples) for departmental projects or where speedy deployment of content management and low cost are key, as it eliminates the need for scheduling an IT project or developing a capital budget. IT professionals in charge of content management efforts should develop a proactive strategy for using content in the cloud. Business buyers and users, faced with rising IT costs and complexity, will find the benefits too attractive to ignore.

Primary benefits:

- Shorter time to solution with less upfront investment while maintaining content integrity and meeting (sometimes deep-) integration requirements.
- For some WCM deployments where larger installations are underutilized, it may be possible to migrate near-term to a significantly cheaper but equally effective SaaS equivalent.
- If the cost of maintaining some ECM applications internally is becoming increasingly prohibitive, SaaS can in many cases provide a lower-cost alternative.

### RECOMMENDED READING

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"Gartner Maturity Model for Enterprise Content Management"

"Content Management Yields Marketing Success"

"Document Imaging Remains a Key Technology as Organizations Look to Go 'Paperless'"

"Get Ready for Content in the Cloud"

"When to Evaluate SaaS as a Viable ECM Model for Your Company"

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