

# Best Practices for ECM Deployment



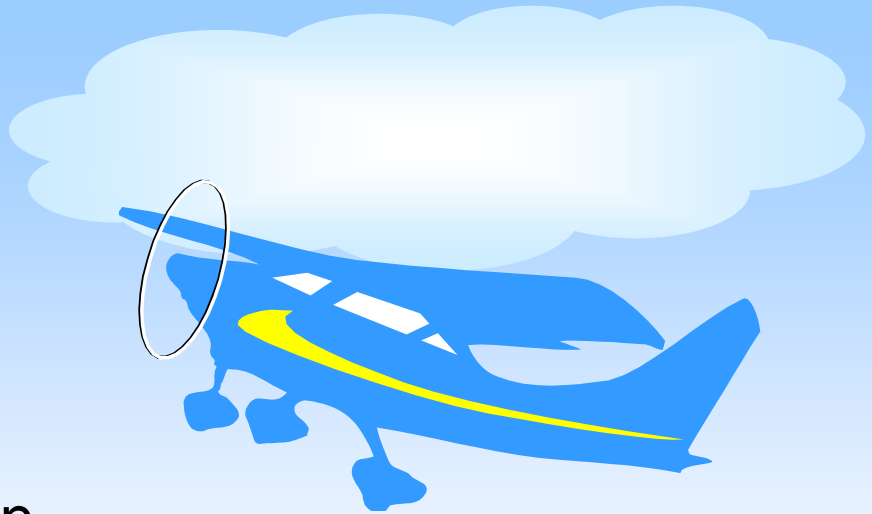
Karen Shegda

Toby Bell

Rita Knox

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# Why Do ECM Projects Crash?



- Lack of user acceptance
- Requirements are vendor driven
- Too many stakeholders - not enough decision makers
- Benefits take a long time to realize
- No change management

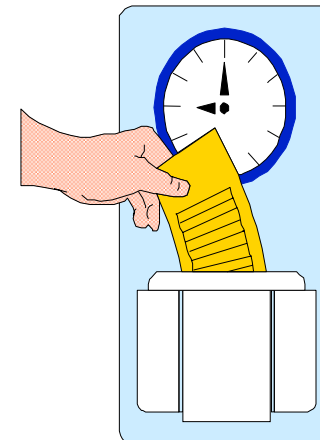
**Large ECM projects (over 500K) that take less than six months in the planning and vendor selection phase will fail at a rate of over 50% (0.8 probability)**

# Key Issues

- How can an organization build a business case and demonstrate the ROI of an enterprise content management project?
- What are the best practices for gathering requirements for an enterprise content management project?
- How can companies effectively deploy content technologies and solutions to address specific business problems and avoid potential pitfalls?

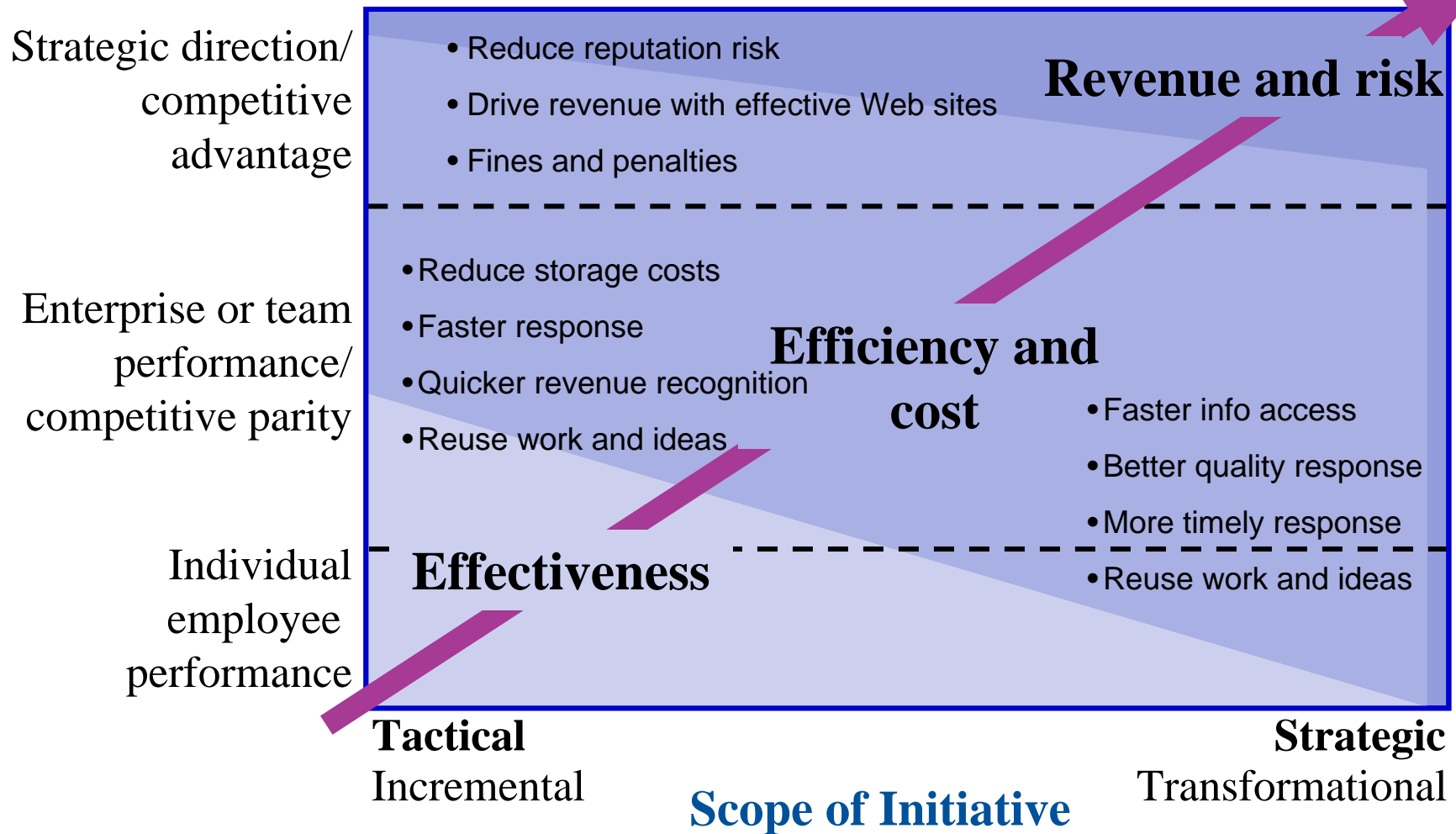
# Clear Project Rationale

- What business problem are you trying to solve?
  - Loan origination
  - Claims processing
  - Marketing brand management
  - Improve customer service
- Why are you saving all this stuff anyway?
  - Records Management
  - E-mail
  - Legal discovery
- How will you measure success?
  - Establish before and after metrics
  - Quantify where possible
  - Do a baseline analysis



# Quantifying the Benefits

## Organizational Impact



# CEVA Basics — What Are You Managing?

<b>Process</b>	Business process steps and substeps are managed through the combination of workflow, business activity monitoring, event triggers and rules management.
<b>Policy</b>	User-input rules are centralized, managed and tested. Rules are executed for automation, event triggers and decisioning (e.g., exception-based underwriting).
<b>Content</b>	Content, including e-mails and image files, are managed from intake to retrieval and utilize content workflow.
<b>Document</b>	Document and forms intake, creation, printing, archival and retrieval are managed through a centralized system. This employs both imaging and document workflow capabilities.
<b>Data</b>	Data is managed, routed within the organization, and pulled from third-party sources and source systems (e.g., policy or claims) on demand.

Portals, Collaboration, Presence, Search, and Roles  
Define WEBA Resources

# The Project Team



## Implementation partner

- System design and code
- Train internal team



## Software vendor

- System architecture
- Install COTS systems



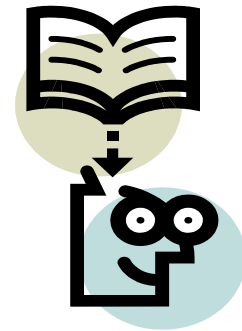
## IT project manager

- Vendor and partner selection
- Manage internal team



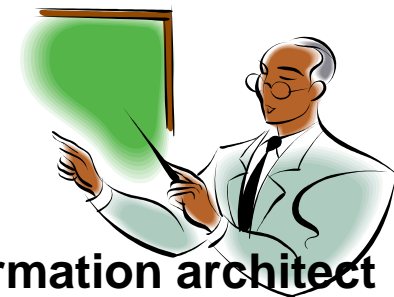
## Business user is central

- Business case
- Use case scenarios



## Requirements specialist

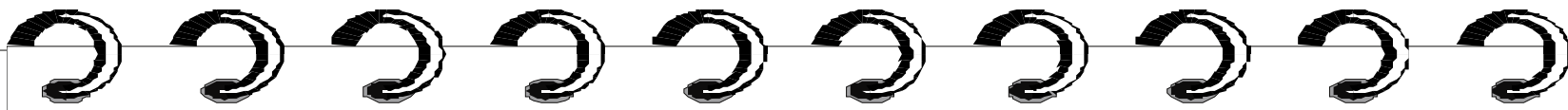
- Inventory the documents
- Document the processes



## Information architect

- Document design
- Information access

# Perform a Needs Analysis

- 
- ✓ Administer a document inventory using a structured approach.
  - ✓ Inventory existing applications and vendors and identify overlapping functional capabilities and integration requirements. Consider establishing a standard.
  - ✓ Inventory processes and people associated with content management.
  - ✓ Identify all content management related projects underway or planned.
  - ✓ Assess policies and present/future regulatory considerations.

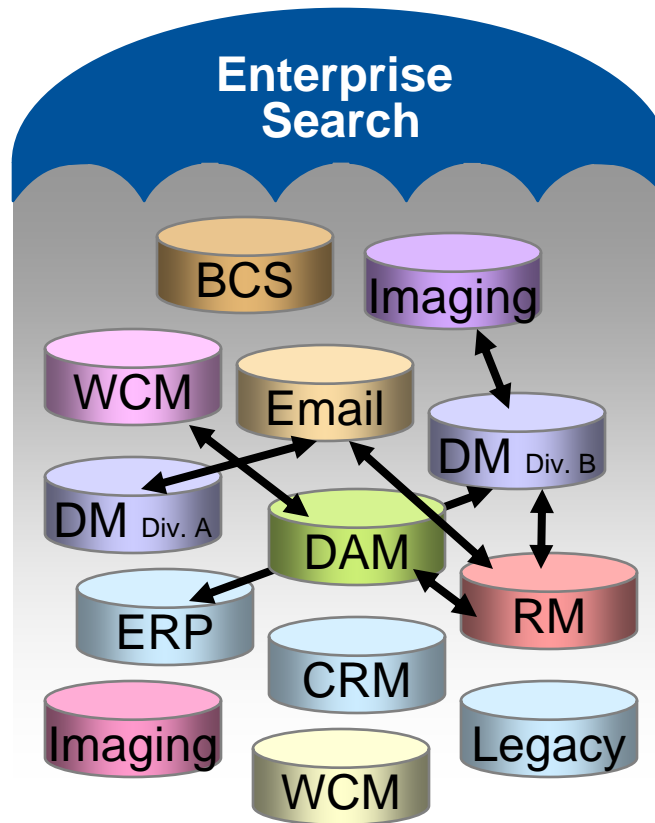
# Federate Before You Consolidate

## Do an Inventory

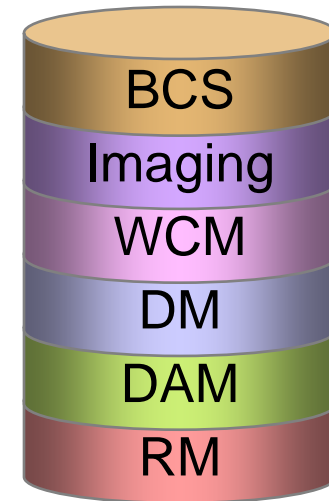
Document Type	HR	Regulatory
Benefits	WRAV	V
Policies	WRAV	V
SOP		WRAV
MSDS		V
Guidelines		WRA
System Document		

**W** = Writer  
**R** = Reviewer  
**A** = Approver  
**V** = Viewer  
**HR** = Human Resources  
**MSDS** = Material Safety Data Sheet  
**SOP** = Standard Operating Procedures

## Targeted Federation

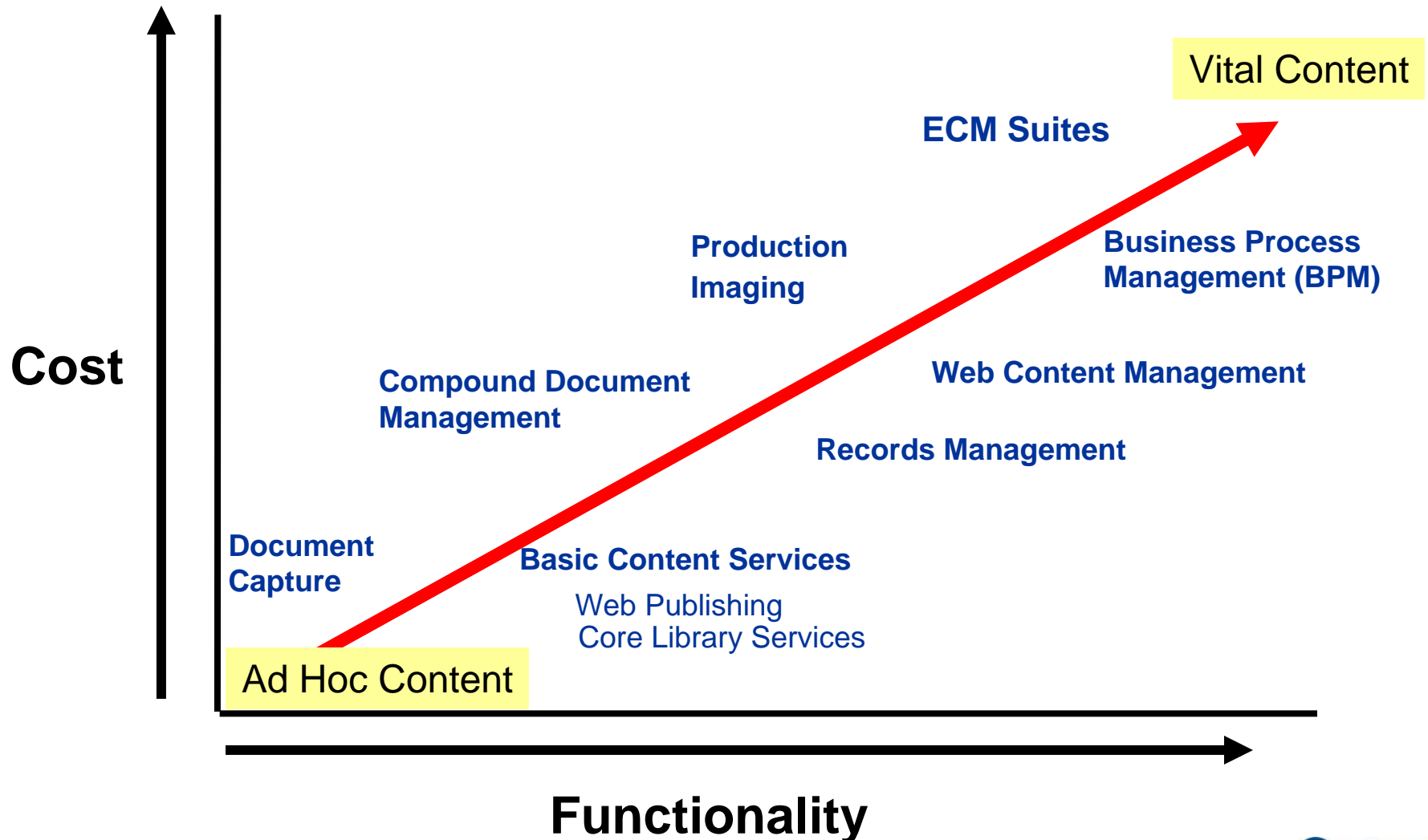


## Planned Consolidation



Eliminate or Retire Redundant Repositories

# Business Value Determines Investment Level



# The Number One Issue: User Acceptance



**Change the way you work**  
**Unfamiliar process steps**  
**Additional steps required (metadata)**  
**Lengthy requirements exercises**



**Document templates and taxonomies**  
**Processes are YOUR processes**  
**Incentives for housekeeping**  
**Material rewards**  
**Management objectives**  
**Training**  
**Change management**

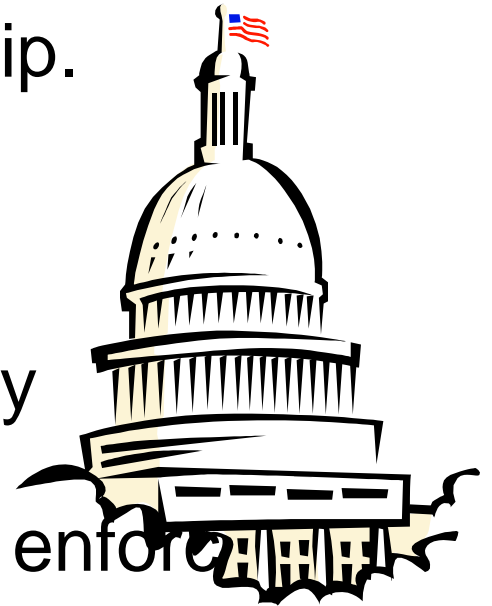


## **Goals:**

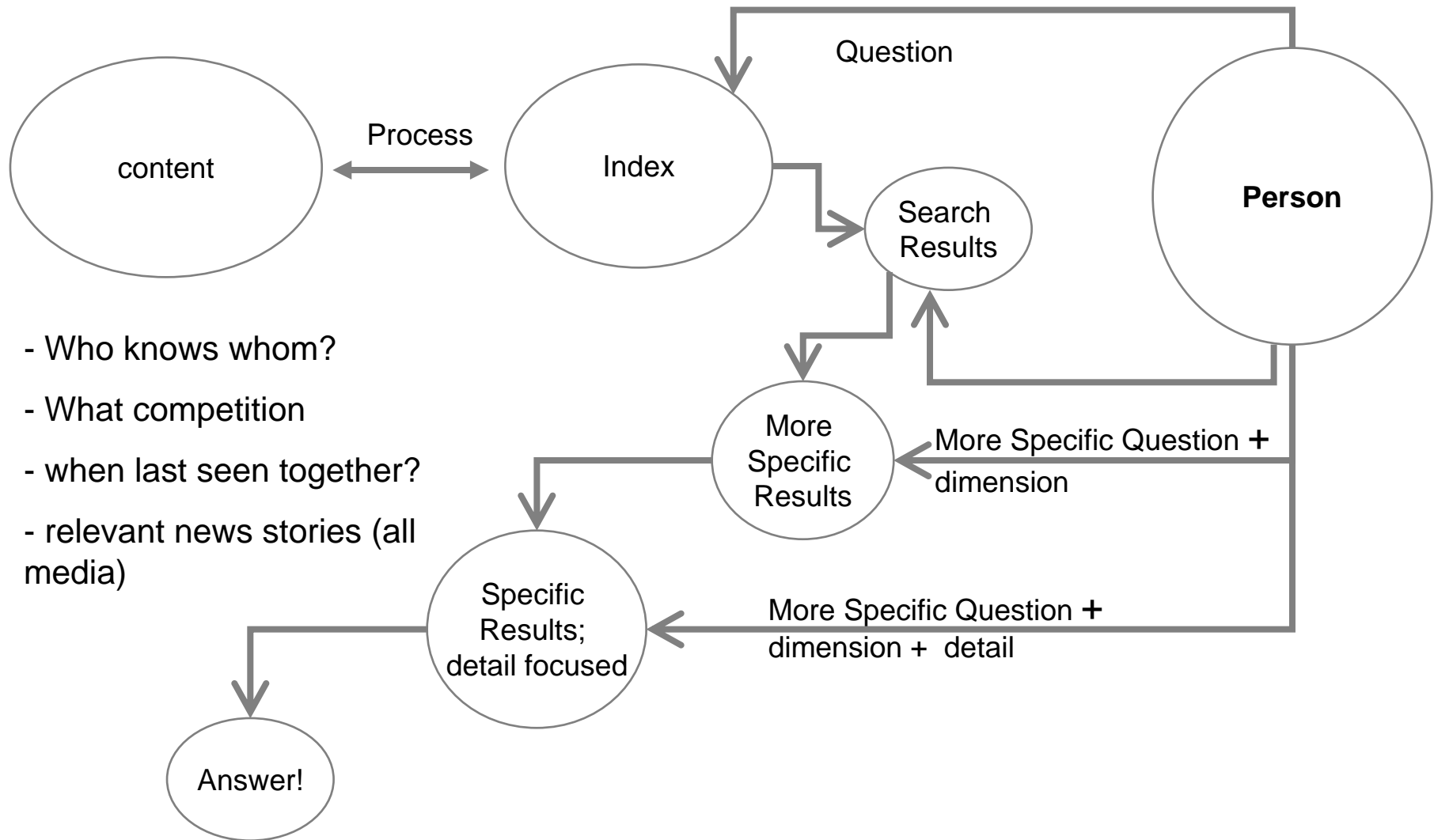
- **Make it worthwhile for the individual**
- **Reward the team**
- **Measure the outcome**

# Content Governance

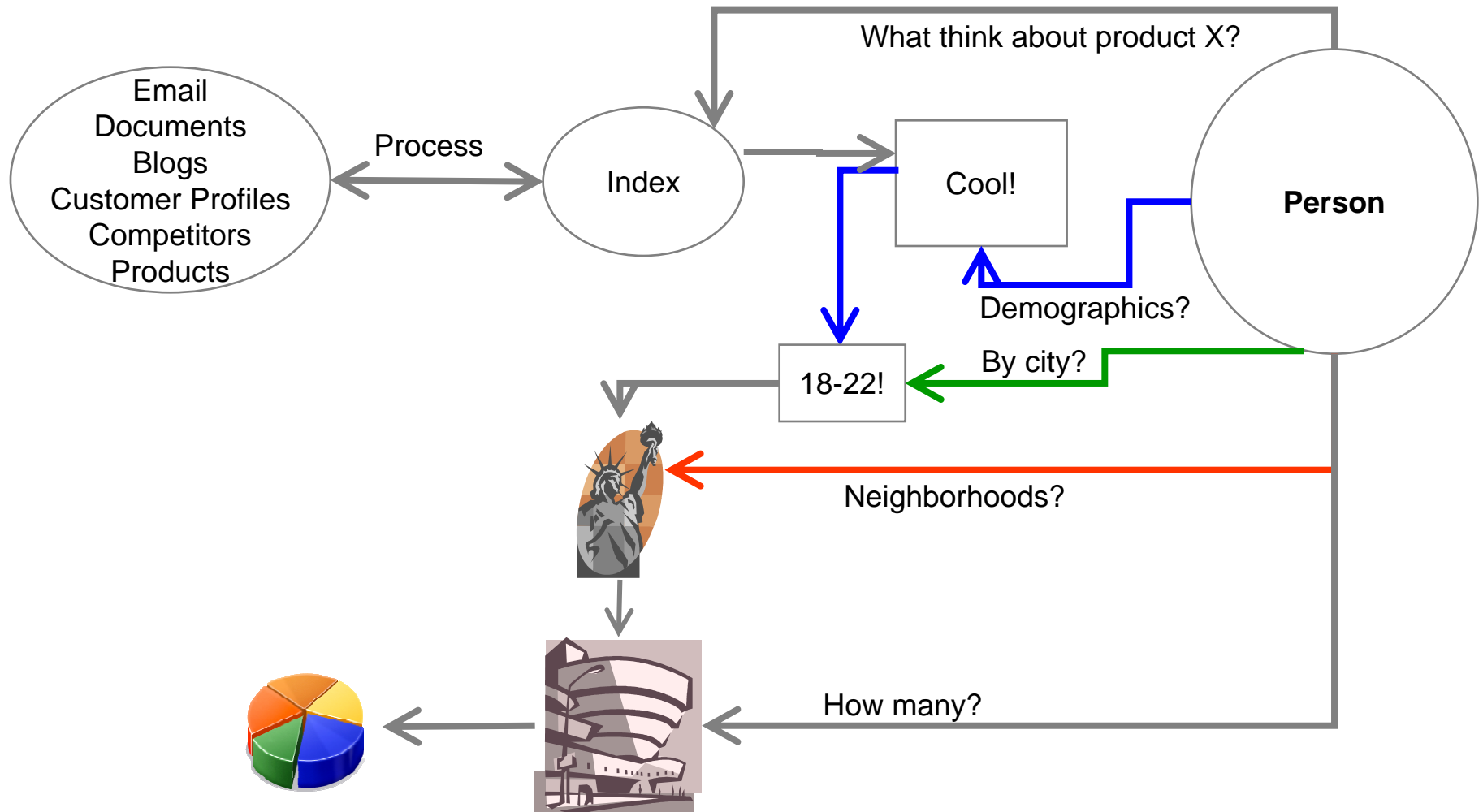
- Establish authoritative content ownership.
- Create a content governance board:
  - Enforces policies and standards
  - Settles disputes
- Organize human resources to effectively manage contentment.
- Use enterprise content management to enforce a content management lifecycle.
- Use virtual team spaces for unmanaged, shared "working" content.



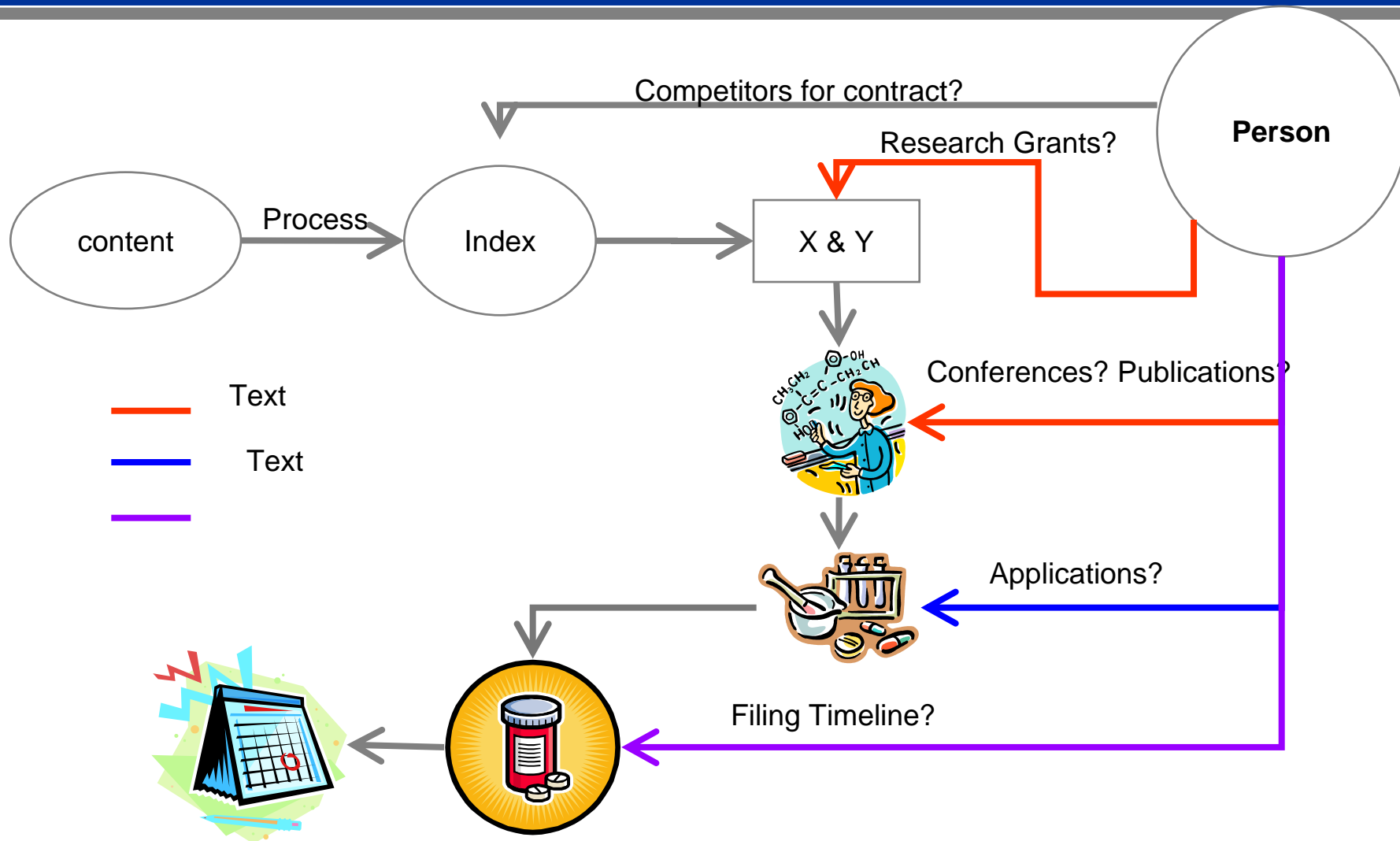
# Content Analytics - Process Example



# Content Analytics – Marketing Analysis



# Content Analytics: Competitive Intelligence



# Ensuring a Smooth Landing: Best Practices and Lessons Learned

- Build the Business Case
- Create the Right Project Team
- Do a Document Inventory
- Inventory mission-critical content processes
- Balance your Project Portfolio
- Gain User Acceptance
- Manage unstructured content as you would structured data

