Enterprise Content Management (ECM)

Introduction to ECM and Business Drivers

AIIM ECM Certificate Programme

ECM Strategy → ECM Practitioner → ECM Specialist → Case Study

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**ECM Practitioner Course Outline**

**Foundations**
- 1. Introduction
- 2. Technologies & Functionality
- 3. Information Architecture

**Tools & Instruments**
- 4. Create & Capture
- 5. Metadata
- 6. Taxonomy
- 7. Security & Control
- 8. Process & Automation
- 9. Findability
- 10. Delivery & Presentation

**Futures**
- 11. Trends & Directions

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**Tools and Instruments**
Using the right tools is vital to the design’s construction.

**Futures**
The best designs for an ECM environment includes a continuous improvement programme with a vision of the future.

**Foundation**
Building a sustainable ECM environment requires strong foundation with a good understanding of the technologies and architectural design.
Agenda

- The (enterprise) content mess
- Defining data, information, content, records
- What is ECM?
- Why use ECM?
- Business value of content
- Technology of ECM
Today...

Poor information effectiveness

- On a scale of 1 to 10 (terrible to excellent), rate the effectiveness of your organisation in managing information
  - 54% give themselves a grade of 5 or less
  - 52% have “little or no confidence” that their electronic information is “accurate, accessible, and trustworthy.”
  - ...yet >90% of organisations view their ability to manage electronic information as critical to their future.

Source: AIIM's State of the ECM Industry - 2008
Impact and perils of unmanaged content...

- Is the explosion of digital information making your organisation more effective or less effective?
- Can your employees find information when they need it?
- Can your employees collaborate on projects no matter where they are located in the world?
- Has your ability to document what your organisation did, why you did it, who did it, and when they did it gotten better or worse in the past 5 years?
- Can your customers find information when they need it?

Creation outpaces management...

- Word, PowerPoint, Excel files
- JPEGs, TIFFs
- E-mails with attachments
- Business system documents
- …on the network on PCs, on sticks, on phones, on PDAs
Resulting in: the enterprise content mess

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Data vs. information

- **Data is:**
  - Raw (unprocessed)
  - Discrete (small chunks)
  - Non discursive (structured)
  - Out of context

- **Information is:**
  - Processed
  - Continuous
  - Discursive (random/unstructured)
  - Context laden

Source: LIS 549 U/TU: Intro to Content Management, Bob Boiko

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What is content?

- **Content is:**
  - Information put to use
  - Information plus metadata
  - Information for a purpose
  - Something contained

Source: LIS 549 U/TU: Intro to Content Management, Bob Boiko
What is a record?

- **A Record is:**
  - ISO 15489 defines records as "information created, received, and maintained as evidence and information by an organization or person, in pursuance of legal obligations or in the transaction of business."

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- **What is ECM?**
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What in the world is ECM?

- Strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to key organisational processes.

ECM is not...

- A single technology
- A black box
- A miracle cure
- Easy

- At the most fundamental level, it is about business and organisational processes, not just technology—and that’s complicated.
Enterprise

- Think like an environmentalist
- Think globally, act locally
- Think strategically, implement tactically

Content

- All content, not just text documents, not just emails without attachments
- How widely do you need to search & retrieve
- Users inside & outside the organisation
Management

- Not just collecting & holding content, but actively managing it

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Strategic information alignment framework

Marchand’s Strategic Information Alignment Framework

- Add value customers and markets
- Minimise Risks market, financial, legal, operational risks
- Reduce Costs transaction and processes
- Create New Reality Intelligence (social, political, technological, etc)


Adding value

Today’s Recommendations For You

Here’s a daily sample of items recommended for you. Click here to see all recommendations.

Source: Amazon.com
Costs: Paper

- Companies spend $20 in labor to file a document, $120 to find a misfiled doc, and $220 to reproduce a lost doc
- 7.5% of all docs get lost; 3% of the remainder, misfiled
- Professionals spend 5-15% of their time reading information, but up to 50% looking for it
- Average document photocopied 19 times
- There are over 4 trillion paper documents in the U.S. alone growing at a rate of 22% per year
  - Source: PriceWaterhouseCoopers

Costs: Storage, transmission, space

- Email:
  - Corporate users received an average of 18 megabytes (MB) per day in 2007
  - Expected to grow to over 28 MB per day by 2011
  - Users send and receive an average of 133 messages per day
    - Source: Radicati Group
  - Average cost to send a package via courier service is between $8 and $15
- Cost of office space has increased 19%
  - Source: Office Space Across the World 2008
Creating a new reality: Collaboration

Minimise risk: Business continuity

Paper warehouse destroyed in fire

A huge fire has ripped through a six-storey paper storage warehouse in east London.

Flames shot 20 to 30ft into the air and smoke from the blaze could be seen across the city.

About 100 firefighters were called to the site in Twelvetrees Crescent in Bow on Wednesday night but say it needs to burn itself out.
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Lost opportunities and missing pieces

- The value of information
- The costs of technology
- Business and technology maturity
- Financial management of ECM
Valuing information?

“"It is superiority in information management that now creates economic value-added for the overwhelming majority of US businesses. [...] It is not salaries and wages that determine the worth of a worker, but how much economic value-added they create [...] in excess of the sum of their compensation.”

Source: The Economics of Corporate Information Systems (Paul A. Strassmann, 2007)

Information productivity

- Represents the efficiency of a firm’s transaction costs
- Calculated by dividing the "information value-added" (operating profits minus cost of shareholder capital) by sales, general and administrative costs

Source: http://www.baselinemag.com/c/a/Projects-Management/The-Baseline-500-List/
“All information-spending dollars are not equal. Some are squandered - such as when the sales force spends 40% of its time reconciling incorrect client billings and arguing about the calculations of their commissions.”

Source: The Economics of Corporate Information Systems (Paul A. Strassmann, 2007)

<table>
<thead>
<tr>
<th>Company</th>
<th>Information Management Costs /Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABBOTT LABORATORIES</td>
<td>$3,965,481</td>
</tr>
<tr>
<td>AMERICAN HOME</td>
<td>$6,579,664</td>
</tr>
<tr>
<td>BRISTOL-MYERS SQUIBB</td>
<td>$8,307,000</td>
</tr>
<tr>
<td>GLAXO WELLCOME</td>
<td>$6,466,588</td>
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<tr>
<td>JOHNSON &amp; JOHNSON</td>
<td>$11,176,000</td>
</tr>
<tr>
<td>LILLY (ELI)</td>
<td>$4,397,200</td>
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<tr>
<td>MERCK &amp; CO.</td>
<td>$6,332,500</td>
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<tr>
<td>PFIZER</td>
<td>$7,847,000</td>
</tr>
<tr>
<td>PHARMACIA &amp; UPJOHN</td>
<td>$3,832,000</td>
</tr>
<tr>
<td>WARNER-LAMBERT</td>
<td>$5,665,300</td>
</tr>
</tbody>
</table>

Table 17 — Differences in Information Management Costs

Source: The Economics of Corporate Information Systems (Paul A. Strassmann, 2007)

Maturity?

- A 2008 Joint Research Project between Baseline Magazine and the BTM Institute
- Identified 4 aspects of Business-Technology Management Maturity
  - Process
  - Organisation
  - Information
  - Technology

Content at the core of business process

What % of your CORE business processes do you believe use unstructured content on a regular basis?

![Bar chart showing distribution of responses.]

Source: AIIM View On Enterprise Content Management & Content Management Solutions, 2008

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Financial Management of ECM

- Tracking and documenting benefits
  - Worst-in-class organisations don’t track the hard or soft benefits of their ECM implementations
  - Average organisations develop estimates of the hard benefits at the time they initiate a project CBA, but don’t review those estimates post-implementation to verify whether the benefits were in fact achieved. Soft benefits are primarily anecdotal testimonials
  - Best-in-class organisations use dashboards to track hard benefits quarterly, based on statistics, and then they publish these benefits to internal clients. Soft benefits are typically documented via published case studies


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Key ECM technologies and functionality

- Technology plays a role, but business decisions drive
- Key Technologies and Functionality:
  - Document management
  - Electronic records management
  - Workflow
  - Imaging
  - Collaboration
  - Web content management
  - Content security
  - Search
  - Browsing
The state of content in the enterprise is a mess

Differences in data, information, content and records, and the supporting systems, can cause disconnects for the business

A definition of ECM

The ways that ECM can be applied to business drivers

Understanding and quantifying the business value of content