

How to Develop an ECM Strategy

The first step in the development of an Enterprise Content Management (ECM) implementation plan is the creation of an ECM Program Strategy document.

The information gathered in this project forms the basis of your organization's "current state". When you combine this information with your organization's picture of what the 'future state' is you will be able to outline an ECM Program Strategy.

The program strategy will outline the types of activities necessary to fulfill the mission of the program.

Step 1: Identify Your Organization's Current State

- Identify the information flow from systems and applications that will create content in the organization. This includes identifying the systems and applications or components that should be aligned for managing content in your organization.
- Document the inputs and outputs of the systems as well as content types and people involved.
- Document the business process in use.
- Assess the organizational structures and reward systems.

AIIM Tip

This information will help to form the business vision, which will begin to shape what the future state will look like after the ECM program is implemented. You may need to interview executives or other internal stakeholders to gain an understanding of their business objectives.

For more information

- [What is ECM?](#)
- [Creating an ECM Organization Structure Part 1: Building your team](#)
- [Reimagining ECM in the Modern Enterprise](#)
- [A Winning ECM Recipe: the infographic](#)
- [14 Steps to a Successful ECM Implementation](#)

Step 2: Review the Organization's Environment

- Describe/outline the organization's size and complexity
- Identify the scope and nature of the project
- Identify the level of consultation needed
- Review the resources allocated to the project and their skill sets

AIIM Tip

Establish a baseline as a part of the success measures you set up for a project. Before you can put a strategy together, you must understand what is needed across the organization. Now is a good time to also take a look at the behaviors and processes that need improvement and understand the level of support available across the organization.

For more information

- [Business Case: The Purpose and Benefit](#)
- [Document Management, Records Management, and SharePoint Trends](#)
- [How to Write a Business Case](#)
- [Business Case and Business Case Analysis](#)
- [6 Essential Elements for a Winning Business Case](#)
- [The Foolproof Way to Present Your Business Case](#)

Step 3: Measure Success

- Outline the critical success factors that will determine how the program can be assessed.
- Identify the key performance indicators (KPIs) that will be measured and data that will be used to assess how well the critical success factors are met.
- Establish target measurements so that tangible progress can be measured on a regular basis.

AIIM Tip

An organization, particularly the organization's management – likes to know and feel they understand how a project is progressing. Picking the correct success factors and adhering to them with the organization will help you communicate the progress of the project and keep the project focused on the organization's objectives.

Consider building an Application Lifecycle Management (ALM) approach for your project to share documentation, source code, artifacts, activities, task, issues and other useful and tangible facts of the work done. Building your own ALM procedures and practices will help you during the development spending less time on keeping all the people on track and pointing each domain of interest aligned with the main vision.

For more information

- [2016 - The Year We Conquer Information Chaos Webinar](#)
- [Project Metrics and Measures](#)
- [Measuring Project Success Using Business KPIs](#)
- [6 Ways to Measure the Success of Any Project](#)
- [How to Measure Project Success – Project Management](#)
- [Measuring Project Success](#)

Step 4: Identify Business Drivers

Outline the business drivers for change. This will include insights from senior managers as well as external industry and market research. As you were documenting the current state in Step 1, you no doubt began to see where your current processes lacked control, provided for inconsistencies and duplication, which may have resulted in confusion. These are examples of the business drivers you may find in your organization.

AIIM Tip

Identify the imperatives that are compelling the business to improve its handling of content, encourage better collaboration or communication, or raise productivity. Remember that technology continues to evolve and that there are disruptive forces that challenge the way your organization functions and manages information.

For more information

- [8 Steps Guide to make your ECM Project a Success](#)
- [The Public Value of ECM](#)
- [ECM at the Crossroads](#)
- [ECM Isn't Delivering](#)
- [An ECM Space Oddity: Still Chaotic After 6 Years, 2001 Stories](#)

Step 5: Define Objectives and Critical Success Factors

- Identify the objectives you want to accomplish making sure to align your strategy with the business goals defined by senior management.
- Consider the kinds of skills needed across the organization to fulfill the objectives you identified.
- For each objective, define the actions that can achieve the objective.

AIIM Tip

As you define your critical success factors, try to make them specific to the objective that you are trying to achieve. All objectives and critical success factors should reflect your organization and what it has in mind for conducting this project. Think with the end goal in mind. Remember that information assets are corporate assets and must be valued and managed as such.

For more information

- [ECM Hurdles a Barrier](#)
- [Sometimes Less is More](#)
- [Critical Success Factors from MindTools](#)
- [How to Determine Critical Success Factors For Your Business](#)
- [How to Write Critical Success Factor \(CSF\)](#)
- [Project Charters – What is a Critical Success Factor?](#)

Step 6: Communicate

To avoid most of the common pitfalls, communicate about the ECM program and strategy with senior management and relevant stakeholders. Make sure they understand the business drivers behind the proposed program. Share case studies and examples to help them better understand.

- Educate about the program goals to help ensure everyone understands the benefits.
- Engage users in decisions and requirements gathering.

AIIM Tip

Communicate, communicate, communicate! There is no such thing as too much communication when you are undertaking a project like implementing ECM.

For more information

- [It's Really About Communication](#)
- [Scope Creep: The Deadline Killer](#)
- [Remember Portal is a Noun Collaborate is a Verb](#)
- [How Ready is Your Organization for Change](#)

Step 7: Develop a Program Roadmap

- List additional projects within the program that will need to be completed to reach the desired end state.
 - Conduct the business assessment – this will identify how the organization operates and will form the foundation for most of the other projects.
 - Conduct the technology assessment – take a look at the existing IT architecture and infrastructure to identify the systems that exist and what needs to be created.
 - Develop the business case
 - Develop the program roadmap
 - Inventory the information assets
 - Identify the business content
 - Develop a content management framework if it does not exist already. The framework should include policies, procedures, standards, and guidelines
 - Develop an organization-wide taxonomy
 - Develop a metadata model to ensure metadata is entered and captured consistently
 - Develop a thesaurus for consistent terminology use
 - Develop or update the records retention schedule
 - Develop file plans

- Develop user focused processes and procedures for how to interact with the content and ECM system.
- Develop procedures and processes for supporting and maintaining the system
- Periodically review existing security models, processes and procedures to ensure they meet requirements and needs
- Define high-level requirements for the program. Include targets for completion. Focus on risk assessments and dependencies and outline the type of work that needs to be completed at this stage.
- Periodically review existing security models, processes, and procedures to ensure they meet requirements and needs.
- Identify any infrastructure requirements and dependencies that may impact the ECM project.
- Identify any design dependencies for the technical staff.

AIIM Tip

As you have been talking with people in your organization to better understand their needs, undoubtedly you have also been finding out that there are many projects that must be completed as well. All of the projects do not need to be done at the same time. Don't let yourself or your project team be distracted by all the work. Instead, establish a 3, 5, or 10 year plan for completing the work.

For more information

- [Think “Initiative” not “Project” for Success](#)
- [What is a Project Roadmap? The 101 for Roadmap Basics](#)
- [What is a Roadmap in Project Management?](#)
- [How to Build a Roadmap](#)
- [Creating a Roadmap to SharePoint Success](#)

Step 8: Procurement

In this step, you should:

- Design an ECM system to be built or identify and procure an ECM system from a third party vendor
- Implement the ECM solution across part or all of the organization
- Integrate the ECM solution into the line of business applications

Consider that adopting an ECM solution is a deep and important choice, make sure to compare each vendor on the following topics:

- Roadmap: take a look where they are going and what can fits with your needs

- Licensing model: per user / per CPU / per environments
- Features and functionalities available out of the box
- Supported standards and protocols: CMIS, WebDAV, FTP, IMAP, ...
- SLA levels: 9x5, 24x7, ...

AIIM Tip

Before you enter into the procurement phase of your project, make sure you understand the procurement process in your organization. Also, make sure you have a representative from the procurement department on your project team so they understand what will be purchased and the need to adhere to the project schedule.

For more information

- [Content Management 2020](#)
- [Get More from On-Premise ECM](#)
- [How to Select an ECM Vendor in 9 Steps](#)
- [6 Considerations for Selecting the Right ECM](#)
- [How to Select the Right ECM for Your Business](#)

Step 9: Support Projects

- Develop a migration plan to ensure information is accessible
- Develop a litigation support plan for when litigation is underway
- Conduct a 'shred day' or organizational clean-up day
- Design and deliver training
- Monitor and audit the ECM system
- Identify and implement program updates

Make sure to build a tailored training program for involving at each level the right persons.

Typically, you should deliver at least three different courses for system administration, developers and editors or users.

If required by the complex fragmentation of users groups, arrange dedicated user trainings for every kind of roles in the company.

The ALM approach is the winning scenario for maintenance activities. Be sure to have an issue tracker available for tracing bugs and improvements. The collaborative approach is the key for high quality control on iterations for your project.

AIIM Tip

There will be these and other projects that will directly support and affect the implementation of your project. Consider recruiting some additional team members to help with these and other implementation related projects so the project team remains focused on the project.

For more information

- [Enterprise Content Management Training Course](#)
- [ECM Decisions Industry Watch Report](#)
- [Information Security: Checking the Locks](#)
- [ECM: Impact on Collaboration and Social Business](#)
- [Enterprise Content Management Quick Study](#)
- [Managing Content Beyond the Corporate Walls](#)
- [A Winning ECM Recipe: the Infographic](#)