


**Breathing Life Back into
your ECM Deployment**
Session T22


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“An idea isn’t worth that much. It’s the execution of the idea that has value. If you can’t convince one person that this is something to devote your life to, than it’s not worth it.”



Joel Spolsky, *Sink or Swim*, SXSW 2006





“There are no secrets to success. It is the result of preparation, hard work, learning from failure.”
- Colin Powell


“Failure is the opportunity to begin again, more intelligently.” - Henry Ford

“Vision without action is a daydream. Action without vision is a nightmare.”
- Japanese Proverb

	<h2>Overview</h2> 
	<ul style="list-style-type: none">• Who am I?• What is an ECM? And what isn't it?• ECM implementations - approaches• Deployment Methods & Delivery Methodology• Assess "lessons learned"• Recognize opportunities• Keep the momentum going• Questions

	<h2>Who Am I?</h2> 
	<ul style="list-style-type: none">• IM for app 18 years• ECM product knowledge 10 years• Implementations across NA<ul style="list-style-type: none">– Case Management (VA CBI)– RIM Programs (BC GOV)– Model Office (City Of Vancouver)– Business Processes (City of Kirkland)– Departmental (US District Court, South Florida)

	<h2>An ECM is.....</h2> 
	<p>"...the technologies used to capture, manage, store, preserve & deliver content & documents related to organizational processes. ECM tools & strategies allow the management of an organization's unstructured information, wherever that information exists."</p> <p><i>AIIM, http://www.aiim.org/about-ecm.asp</i></p>




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ECM IS.....

“...more than simply technology; it is also an activity that involves people & process.”

Barclay T. Blair, IMJ, Sept/Oct 2006




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ECM isn't.....

“ECM is a strategy, NOT a product.”


*Cynthia Launchbaugh
ECM From A New Point Of View, Business Trends Quarterly, Q3 2006*



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Approaching the
ECM Implementation

- How did you measure up?
 - Executive buy-in / Commitment
 - High Level Sponsor
 - Knowledgeable staff
 - IT on board
 - A PLAN! (proper methodology)
 - Migration
 - IM pieces massaged for ECM world
 - Build for growth



Approaching the ECM Implementation


- Deploy in Manageable Units
- Communication!!
 - To users
 - Periodic Executive reviews
 - Manage expectations yet create excitement
 - Perhaps create a brand
- Consider technology
 - Infrastructure
 - Desktop vs Web Client



Deployment Methods



- Three common ways to deploy:
 - Line of Business
 - Departmental or Model Office
 - Enterprise wide



Where did yours fit??






Line of Business

- Addresses a specific business process (i.e., tracking student aid applications or managing complaint forms)
- Has clear business objectives (i.e., reduction in order processing time or fewer items of correspondence lost)
- Has a small number of customer stakeholders

	<h3>Model Office</h3> 
	<ul style="list-style-type: none">• Handles several functionally related business processes (e.g., a finance dept having processes related to A/P and A/R)• Serves one dept or organizational unit• Has a limited number of stakeholders from the same department• Involvement from senior management• Incorporates a core configuration that stretches across the processes within one department

	<h3>Enterprise Wide</h3> 
	<ul style="list-style-type: none">• Covers many business processes in multiple departments• Handles business processes that span departments• Has many stakeholders across many departments• Involvement from executive management• Incorporates a core configuration across all departments• Uses multiple model office workshops to validate the core configuration


	<h3>Enterprise Wide</h3> 
	<ul style="list-style-type: none">• Stand up the Model Office first<ul style="list-style-type: none">– Identify the department of office– Develop the core configuration for that office– May elect to do a pilot for one LOB before rolling out to the entire office• Use the Model Office as the template for rolling out to the Enterprise<ul style="list-style-type: none">– May need to further breakdown the enterprise into smaller functional units– For each unit, use the Model Office approach



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Delivery Methodology


- Was enough attention paid to....
 - Planning
 - Analysis & Design
 - Deployment
 - Closure



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Delivery Methodology


- Planning
 - Meetings
 - Schedules
 - Risks
 - Change Control
 - Training
 - Roll-out
 - Executive updates



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Delivery Methodology


- Analysis & Design
 - Technical Architecture review
 - Training for Core Team
 - Interviews (BA) & Workshops
 - Configuration development & report
 - Business Rules (naming conventions, IM definitions)
 - Deployment/rollout/migration strategy



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Delivery Methodology


- Deployment
 - Install & Configure software
 - Validate Configuration
 - Train End Users
 - Create "Cheat Sheets" / Procedures Guides
 - Provide Post Deployment Support



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Delivery Methodology

- Closure
 - Final Acceptance (may include changes)
 - Close out report (lessons learned, recommendations)
 - Handover to Technical Support
 - Strategic Planning for Future




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Assess Lessons Learned


Any of these familiar?

- Plan was not solid
 - Too ambitious
 - Not focused
 - Not enough preparation
- Users did not buy in
 - Too hard to use
 - Not intuitive
- Executive support lack lustre
 - No communication



Assess Lessons Learned

- Training poorly planned
 - Too early
 - Not clear what's expected
- Not enough testing
 - Workflow / process
 - Security
 - Plan!
- Risks not properly monitored




**Lessons Learned
Can we fix it?**

- Complicated design
 - Review for ways to streamline (less metadata? Less complicated workflow? Users perform fewer tasks?)
 - Recognize when you can't change
- Re-visit business rules and training
- Re-gain focus
 - Original intent?
- Ensure continued support (e.g. internal committee) – MEET!



**We went live –
so now what?**


- Opportunities for growth / expansion
 - Scanning / back scanning / migrations
 - Who is ready? The “easy” win.
 - Workflow
 - Pain points
 - Revisit notes from initial go live for opportunities
 - Look at / review the usage of current system
 - Prioritize! Plan!



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Moving forward


- Test environment
- Keep your focus while noting opportunities
- Always maintain relationship with IT
- Communication!
 - Internal lunch and learns
 - Flyers
 - Updated rules / procedures
 - Celebrate small successes
 - Orientation sessions
 - Questionnaires



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The Little Things

- Do a refresh of your test from Production on a regular basis
- Try to train on your database
- Listen to your users
- Update your reports
- Don't schedule major changes when staff availability is low
- Have policies and review them
- Demonstrate ROI
- Bring in external help



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Maintaining your enthusiasm

- Consult other departments / parts of your organization
- Consult other "like" organizations
- Be part of your local IM community (e.g. ARMA)
- Collaborate with others
- Attend training / conferences
 - Webinars
 - ARMA / AIIM / Colleges / Universities




Research!

- <http://www.ecm-blog.com/>
- <http://www.arma.org>
- <http://www.aiim.org>
- <http://www.doculabs.com/>
- <http://www.gartner.com/>




What did we learn?


- Executive Support
- Plan!
- Delivery Framework
- Backtrack early
- Business Rules
- Communicate!
- Liaise with IM community (been there, done that!)



Questions????



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Thank You!

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