

Creating an ECM Strategy

Technology as a Service

Presented by Karuana Gatimu, ECM^P

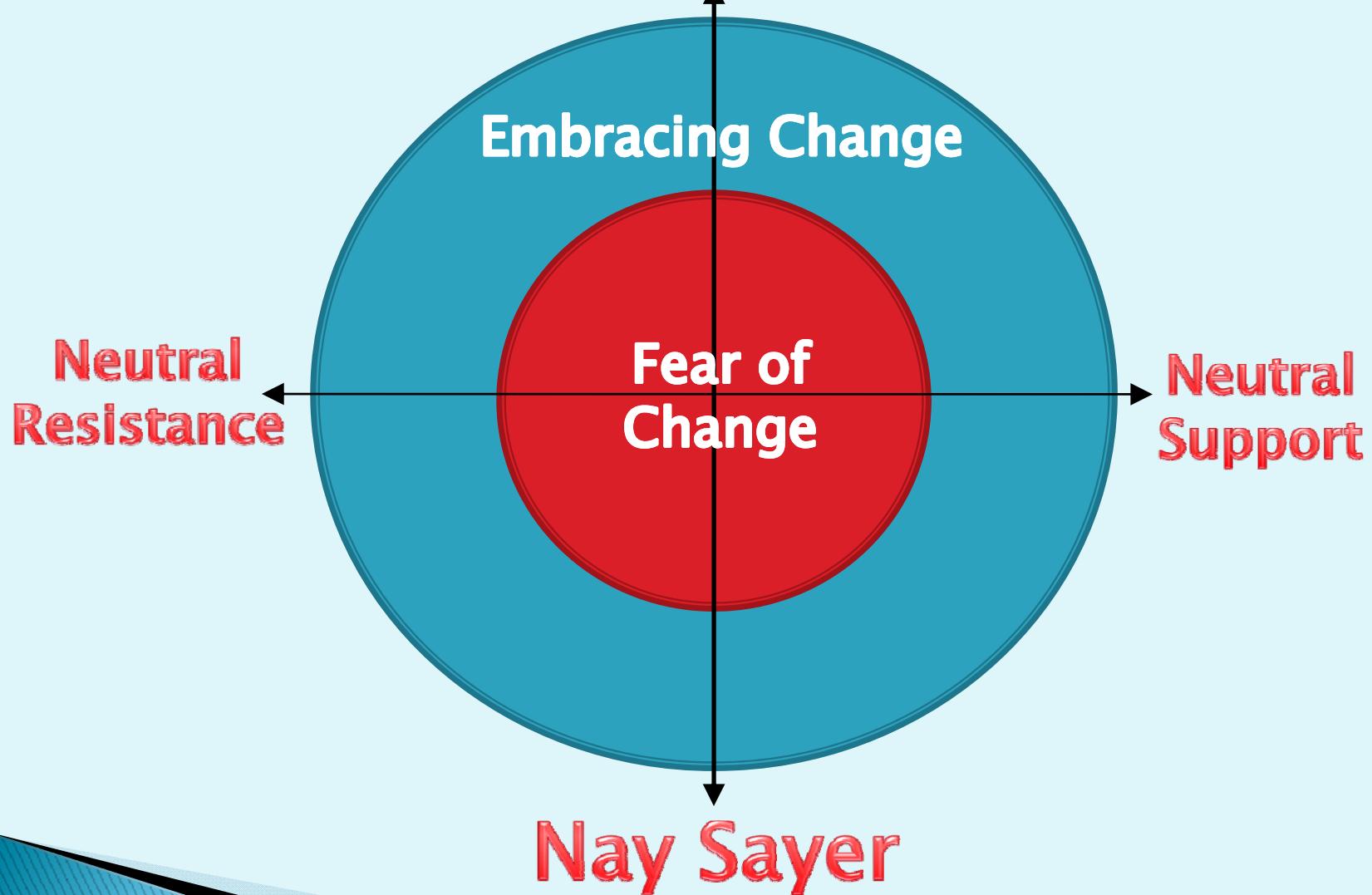
Who Am I?

- Technology professional with 19 years experience in project management, custom application development and corporate training.
- Certified Enterprise Content Management Architect
- Currently Director, Marketing Operations & SharePoint Architect for Sketchers USA, a global footwear manufacturer
- 12 Years as content management specialist for legal and government industries
- Principal Enthusiast at SharePointStrategist.com

We are more than our data points!

- ◆ An ECM Strategy is an opportunity to embrace change
- ◆ Enhance communication & strategic clarity
- ◆ Identify obstacles and old institutionalized habits
- ◆ Making different communication choices will change the tenor of your project
- ◆ Trust yourself to learn how to handle it differently

Change Agent



An ECM Strategy – Why You Need One

What Is It? An ECM Strategy document is an iterative document which outlines your requirements, approach & measurable goals for delivering ECM services to the enterprise.

- ◆ Focus on Technology as a Service
- ◆ Start the Conversation – Engage Others
- ◆ It's a Process not a Product
- ◆ Evaluate Existing Systems & Processes
- ◆ Find Your Pain Points

The Process – Vendor Independant

- ◆ Gather your Strategy Team
- ◆ Define your vision – Creating an ECM Strategy document
- ◆ Gather information about each segment
- ◆ Write & Review
- ◆ Circulate & Iterate

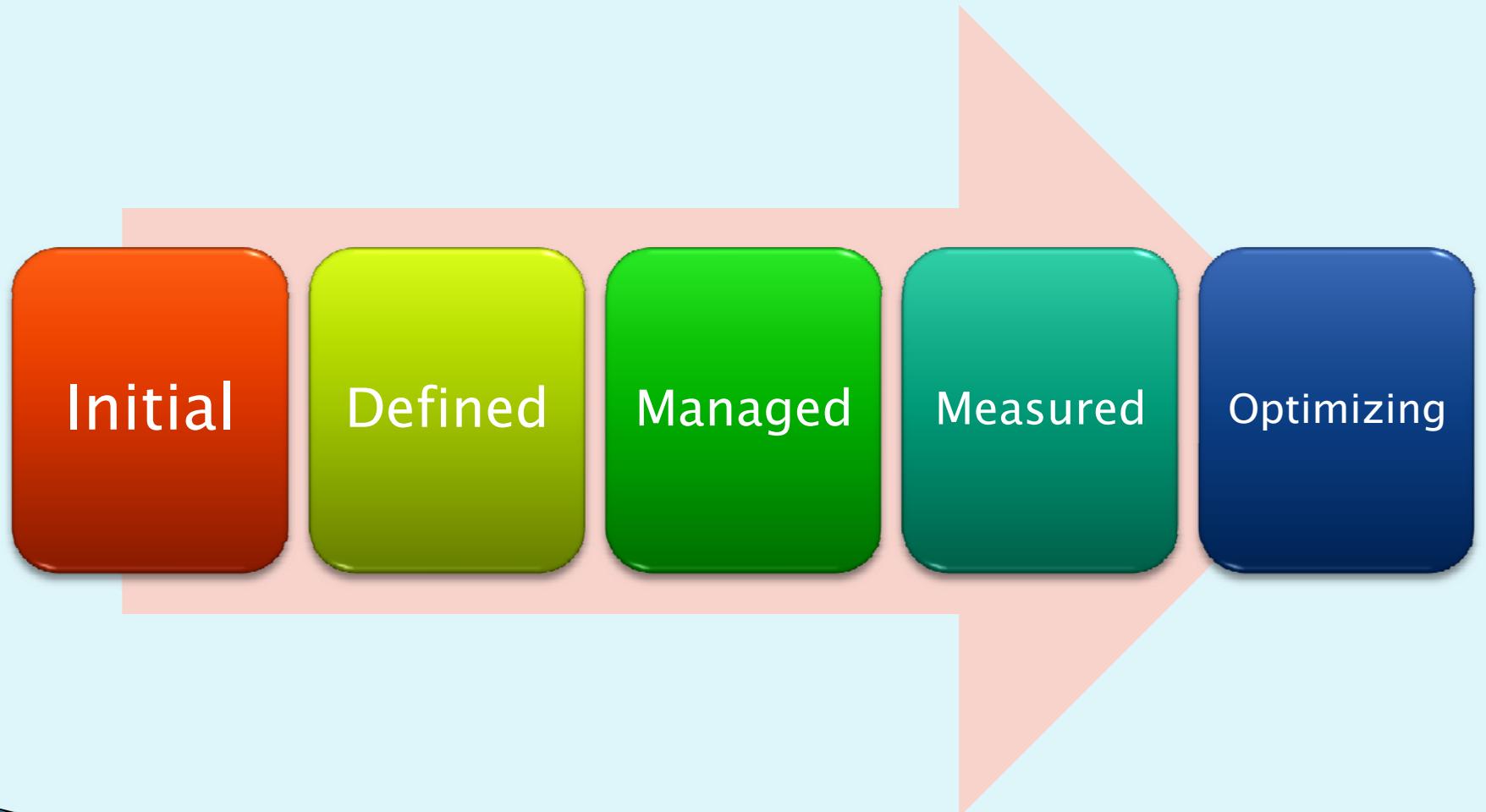
A Word About Project Management

- ◆ **Understand Your Process:** Whether you use the SDLC, MSF, RUP or a hybrid have a project management process
- ◆ **Establish Project Stakeholders:** These executive level people will help you manage organizational change
- ◆ **Establish a Communication Plan!** Know in advance how you will communicate about your project
- ◆ **Plan your Resources:** Yes, even if you are a team of one have a resource plan
- ◆ **Define Success:** Find measurable goals and track your success. Create a feedback process for your users

Getting There – A Virtual Workplace



Capability Maturity Model (CMMI)



Body of Work Reference: Carnegie Mellon SEI
<http://www.sei.cmu.edu/cmmi/general>

Challenges to Implementation



New vs. Existing Deployments

- ▶ If you are new:
 - Think about an appropriate pilot project to cut your teeth on
 - Do not over commit or deploy all features at once
- ▶ If you have an existing deployment:
 - Which segments can you enhance?
 - How are you delivering value to your users?
 - Which pieces of the strategy have you missed on previous projects & how can you improve?



Architecture Considerations

- ▶ **Taxonomy** – How you classify data as expressed through:
 - Database & web app design
 - Content types
 - Custom columns
 - Farm metadata store
- ▶ **Legacy Integration**
 - Links to external databases & other LOB apps
- ▶ **Data Conversions**
 - Unstructured to Structured Data
 - File Stores

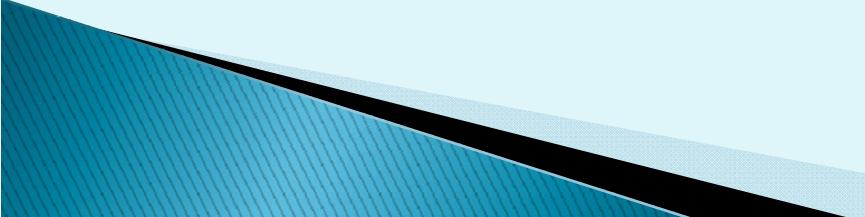
Compliance & Governance

- ▶ Information retention policy
 - Document & data life cycles
- ▶ Legal (litigation & other requirements)
- ▶ Executive management review/approval
- ▶ Enterprise change management policies
- ▶ SOX
- ▶ HIPPA

Each consideration can be handled by defining metadata with associated workflows, audit trails, publishing sites, content expiration and a taxonomy that identifies the owners & categorization of content.

Compliance & Governance

- ▶ Define the Information retention policies first
 - Document & data life cycles
- ▶ Evaluate ECM Software to identify features & tools that will help you to implement & enforce your policies
- ▶ Use visual workflow tools to show lifecycles
- ▶ Show human interaction with system expirations
- ▶ Add complexity by iteration



Fault Tolerance & Data Protection

Gain & maintain the trust of the enterprise to reliably safeguard their data

Hardware/Software levels

Backup & Maintenance Plans

Fire Drill Schedules & Emergency Procedures

Scalability

Immediate
and future
needs

Amortized
costs

Hardware,
licensing,
service
expenses

Resource
Allocation

Education of Internal
Resources

Institutional
Knowledge
Management

Balance Internal &
External Expertise

Long Term Planning

Cost & Risk Analysis



Goals & QA

- ▶ Goals by Quarter for MBO planning
 - Be careful what you publish!
- ▶ Quality Assurance & Measuring
 - a. User feedback process
 - b. Revision criteria
 - c. Defined criteria for success
 - d. Iterative development processes
 - i. Prioritize feature roll outs by iteration

Resources

- **Web Resources:**
 - Vendor Specific Information (Microsoft, Oracle, EMC)
 - [SharePoint University](#)
 - [SharePointStrategist.com](#) – my blog
 - Outline of ECM Strategy
 - Job Descriptions
 - MSF Framework links
 - Bloggers Universe
- ▶ SharePoint Deployment & Governance Using Cobit by Dave Chennault
- ▶ AIIM.org – ECM conference each year

Questions & Comments