

ECM Is Not Doomed to Fail

It may be bruised and bloodied from a decade of mismanagement, misuse, and misunderstandings...but redemption is at hand!

Has any enterprise solution ever been as maligned as much and as often as ECM has been over the past few years? Disproportionately high numbers of failed initiatives, endless issues with user adoption, persistent reports of its imminent demise as a business priority...How did the stark reality of ECM's performance end up crash landing so far from its original promise for many organizations? And, more importantly, what are the strategies and tactics that will allow ECM to finally achieve its potential as the centerpiece of information governance and a principal driver of business value?

As we all know, ECM as a concept was originally heralded as an enterprise-wide solution that would provide organizations with the desired "single source of truth." It was generally implemented as a standalone repository for content where defensible governance and security policies could finally be applied to large segments of the ever-increasing volumes of unstructured information flowing through organizations. It's over-simplifying a bit, but it was often viewed as a magic elixir that would single-handedly eliminate the majority of legal and compliance issues facing organizations. Executives, legal teams, and records managers could finally sleep at night.

Problem was, its planning and implementation were often a one-sided conversation, driven by business owners with bottom-line concerns of governance, security, and compliance. They spent inordinate

amounts of time creating massive folder structures and defining complex classification rules to accomplish their goals. No one ever asked the actual future users of the system what they wanted or needed; not only in terms of interacting with this new application, but also how it could potentially make their jobs more efficient and productive.

WHAT WE HAVE HERE IS FAILURE TO COMMUNICATE

Because of this, many ECM implementations made for an epic battle of wills, pitting administrators focused on enterprise taxonomy structures, rigid application of metadata, fixed permission configurations, and the demand for mass adoption against a rank-and-file influenced by the growing consumerization of technology interaction, fixated on doing their jobs quickly and effectively, and now confronted by another intractable internal system presenting a new set of procedures, requirements, and barriers. Information they (erroneously) considered "theirs" would now be even more inaccessible...and they had to do more work to support this!

It should come as no surprise that the folks in the trenches generally get their way – or some semblance of it – in these confrontations. You just can't monitor everyone all the time. Utilizing true (albeit somewhat misplaced) entrepreneurial spirit, individuals, teams, and even entire departments embarked on work-arounds, evasive



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maneuvers, and avoidance techniques to circumvent these new policies and procedures: Isolated storage servers popped up overnight, idiosyncratic naming conventions were surreptitiously developed, and information was squirreled away on flash drives, laptops, and, most chillingly, public file storage applications beyond the control of the corporate firewall.

For many organizations, it resulted in ineffective and incomplete ECM implementations that left a bad taste in everyone's mouths. No one came out ahead. Executives and senior stakeholders spent a lot of money without realizing their single-source-of-truth master plan, legal and records management still couldn't trust they were seeing the whole picture, and a significant percentage of end users did everything they could to avoid adhering to metadata and file structures, then complained they couldn't find anything.

Where did it fall apart? As Thomas Edison once said, "The value of an idea lies in the using of it." In other words, it wasn't the idea of gathering and governing all your information together in one place that was misplaced, it was what could and should be done with it that was short-sighted.

Past generations of ECM implementations failed because they were based on the idea of an ECM solution being a destination, not part of a process; the star of the show, not a facilitator supporting greater endeavors.

Times have changed, and, to paraphrase another great mind, reports of ECM's death have been greatly exaggerated. In fact, its future as a core enterprise application has never looked brighter. Advances in technology from easier cross-system integration to automation of governance practices to friendlier UIs – are eliciting intriguing new ways of thinking about the potential of ECM. Organizations and vendors are now recognizing that ECM shouldn't be regarded as a siloed final resting place, but rather an integral element driving a holistic approach to Enterprise Information Management (EIM). They're realizing that all the information they've corralled in their ECM systems can not only provide legal and regulatory solace, it also contains a huge amount of the intrinsic value of an enterprise. It is, indeed, a single source of truth...for all the

documented genius, invention, and teamwork within an enterprise. Now, imagine if all that intelligence could be effortlessly integrated with and consumed by other systems and knowledge workers? The end result would be far greater than the sum of the parts. It would lead to increased productivity, greater collaboration, improved agility and innovation across the board.

THINK BIGGER, REACH FARTHER

Make sense so far? To help envision this new approach, it may help to think of an organization as a living organism. All the various enterprise systems – ERP, CRM, ECM, SCM, HCM, and more – comprise the myriad systems that keep that entity functioning and progressing. In human terms, they equate to our respiratory, circulatory, nervous, sensory, and other systems. Growth, not to mention survival, is dependent on these systems not only operating efficiently but also interacting effectively; not only maintaining themselves, but also collectively working together to contribute to the development and well-being of the host.

This interaction is the overriding methodology driving this new way of thinking about ECM and its role within the enterprise. Sure, it'll always have its established role as the repository and archive of information, but let's take it farther:

Let's take its proven capabilities in managing information governance and flow and fully embed them into the complementary systems where business processes actually live.

That's where the real, relevant action is; where end users operate every day, where information is acquired and accessed to get work done, where the true value of the information we create can be realized.

By addressing "content in context," the possibilities for improving both top and bottom-line goals are almost limitless. Embedding ECM within and across an enterprise's systems supports and improves performance across the board. It ties processes and applications together, removing silos, screen flips, and uninformed decisions. Governance policies and practices are taken to the information in situ instead of the information having to come to them. User adoption is a non-issue: Knowledge workers continue to work in the applications they always have,

but now ECM works in the background, providing far greater access to relevant information drawn from other lead applications.

IT STARTS WITH PUTTING THE "AUTO" IN AUTO-CLASSIFICATION

A significant driver behind this newly expanded role for ECM is the ever-increasing regulatory and legal demands for organizations to capture and govern the huge volume of collaborative content we create every day. Fortunately, the leading vendors of ECM applications have made huge strides in using intelligence and business learning models to automate the definition and implementation of consistent metadata, taxonomy, and classification standards. Bless 'em all, but it's been proven time and time again that end users – being human, after all – just can't be trusted to reliably execute enterprise governance practices that may appear subjective and possibly even optional; some resent the additional responsibility, some interpret the intent differently, some are sure their rules are better.

PUTTING CONTENT IN CONTEXT

By taking the accountability and execution away from humans and their pesky individuality and embedding the expanded functionality of ECM directly into business processes, organizations have the ability to define and implement conventions at the macro (governance) level and seamlessly apply them at the micro (process) level, utilizing the ECM solution as the conduit and gatekeeper. It works in the opposite direction, as well: Standards and conventions defined at the process level can be fed back to the master ECM platform and become part of the official policy.

Capture, taxonomy, and permission scoping and planning evolves from trying to encapsulate everything related to every single piece of information across the enterprise to designing bite-sized models on a per-process basis, based on what's best for that process. Day to day, users in any given process are now only faced with a handful of filing decisions instead of dozens of possibilities. Behind it all, the ECM system controls the playing field under direct supervision from RM, legal, and senior management.

WELCOME TO THE FUTURE

A successful digital future is one of synergy, insight, and agility; an environment where data from disparate sources across the enterprise quickly and intelligently comes together to fuel the right decisions at the right time. And what a wonderful world it would be, right? It is all possible (yes, it really is!) but getting there can certainly appear daunting. Dots need to be connected, circumstances understood, rules forged and applied – the considerations seem to go on and on. Where to start?

First of all, plan, plan, and plan some more. Scope, assess, and consult. Target digestible steps, not wholesale leaps. And understand that progressive organizations are seeing a large chunk of the answer is already sitting right in front of them: By building on their existing ECM infrastructure and embedding the immense capabilities of the newest generation into lead applications across the enterprise, the silos can come down and the information can flow to those who really need it.

Like an action hero in a Hollywood flick, ECM started out with noble intentions, faced incredible obstacles, and has emerged from the flames unbowed, wiser, and more capable than ever. In fact, its inherent strengths as organizer, guardian, and bond for all things digital are making it even more indispensable as companies make the essential move to becoming wholly digital enterprises. Utilizing ECM to bridge lead applications and transform processes makes both optimal information governance and incremental business value readily attainable. It's in all of our best interests to treat it right this time.

Embedded ECM in the Digital-First World

Present → Future

ECM is a destination – content is corralled into one location contributing to content silos.

ECM is integrated into lead applications, transparently acting as a bridge across silos.

Content is managed but not maximized. ECM is treated solely as a repository.

Content is delivered in context and inline with processes, creating business value.

Applying metadata is in the hands of the users and often neglected.

Metadata is pre-populated based on corporate and process definitions.

ECM is not focused on making it easier to get work done, it is simply another task.

ECM streamlines processes to mix, match and route the right content to the right people at the right time.

Event-based retention policies but no way to feasibly update triggering metadata.

Lead application contains the business logic and metadata needed to update triggering event.

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