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## Selecting and Rolling Out an Enterprise Content Management System

### Six Steps to Planning Success

By Bryant Shea, Director of Content Management, Molecular®

ENTERPRISE CONTENT MANAGEMENT (ECM) SYSTEM SELECTION AND ROLLOUT IS A MISSION-CRITICAL INITIATIVE FOR MOST ORGANIZATIONS – AND CAN BE ONE OF THE MOST COMPLEX EFFORTS THE BUSINESS UNDERTAKES. ITS COMPLEXITY IS OFTEN MASKED BY ECM VENDORS' CLAIMS THAT "CONTENT MANAGEMENT" SOFTWARE HANDLES EVERYTHING FROM THE MANAGEMENT OF TEXT, IMAGES AND MULTIMEDIA, TO PROVIDING COLLABORATION CAPABILITIES, REAL-TIME CRM INTEGRATION, PORTAL FUNCTIONALITY AND MORE. THESE CLAIMS SHOULD BE MET WITH AT LEAST A MEASURE OF SKEPTICISM.

So, how should an organization determine what capabilities it needs? And, once the business requirements are set, what technologies best address those needs?

The following six steps will help ensure that you have a solid understanding of where you are, where you need to be, and what you need your ECM system to do before you make your technology decision and move on to roll it out.

#### 1. IDENTIFY THE PRIMARY OBJECTIVES

This first step seems obvious, but failing to define your primary objectives and measurable success criteria can set your team up to fail before it even begins. Every ECM product has strengths and weakness, so make sure you know what you're looking for.

For example, are you trying to decrease time to market by creating a more efficient or automated system to handle internal data creation, review and approval? Increase revenue by creating a standardized data format that allows for syndication to partners? Decrease IT support costs by moving all of your content contributors to a single entry system? Improve customer satisfaction and service by increasing the amount of content available

online? Or something else entirely? Once you have determined your primary objectives, decide how to define success. In the examples above, how much additional revenue might be generated, what percentage of support costs the system is intended to save, and/or specific customer feedback might be appropriate measures of your success.

Early agreement will help you determine your ROI and, later, will help your project teams make critical cost/benefit decisions.

#### 2. DEFINE THE CURRENT STATE

Every company is somehow collecting and distributing data and, thus, already has some sort of content management system in place – electronic or manual. Mapping out the current state will help you determine how much effort will be needed to institute change and meet your objectives. Here is a process that has proven useful in determining current state.

- **Content and business process mapping.** Identify each piece of content to be handled by the new system and describe how that content moves through your organization: who creates it and when, who updates it and when, who uses it and when, where is it stored, and how it is transmitted. You should also capture the major pain

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points people are experiencing with the current process. This information will help you understand the total amount of content you need to handle, types of content you will need to handle, how complex a workflow engine will be required, and how people expect to receive their content.

- **Repository audit.** Identify every repository currently in use, including databases, web site, shared drives, etc. This information will help you understand what data import, integration or export capabilities the new system must support, and will be useful in scoping the overall size of the integration effort.
- **Tools audit.** Identify the tools currently in use to create, edit, maintain and transmit content. You may not want to keep these tools in place, but understanding what users currently use can help you determine how much training will be needed if you roll out something very different.
- **Skill assessment.** Determine what development and integration skills currently reside in-house. This will help you decide whether to use and/or train current staff, procure additional professional services, or create a hybrid solution. Be sure to figure this cost into your ROI calculations.

### 3. IDENTIFY THE HIGH LEVEL BUSINESS REQUIREMENTS

Using the data gathered in the previous step, create a high-level business requirements document to use as a basis for your future state discussions. As you create this document, be sure to map each business requirement back to your primary objectives; this will help you prioritize the requirements.

You should also try to determine whether some of the business requirements can, or should, be addressed by changes in business processes rather than through technology.

### 4. CREATE A GOVERNANCE COMMITTEE

One of the most common challenges facing ECM implementation today is dealing with individual systems that have been created by discrete units within the organization. Many times individual units have their own budgets, IT staff and objectives around content management, and getting everyone pointed in the same direction is no small task.

Forming a Governance Committee early on in the process is an essential step to longer-term success. Here are some critical success factors in the formation and ultimate effectiveness of the Committee.

- An executive sponsor, who acts as the champion for the project.
- Executive level representation from all affected business units.
- Executive level representation from the organization that oversees all IT within the company.
- Agreement that the Committee will have jurisdiction over the selection and rollout of the centralized system – and control of the budget.
- Clear mutual understanding of the roles and responsibilities of business units, and who will control content creation, content storage, design, technical architecture, etc.
- An escalation procedure for mediation if there is disagreement between units or among Governance Committee members on primary objectives and/or on high-level business requirements.

### 5. DEFINE THE FUTURE STATE

You know your current state, and you have a leadership team and agreed upon processes in place. It's time to determine how the future will look.

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Pulling the Governance Committee and other key players in the organization into a multi-day, third-party-facilitated strategy session is the best way to achieve effective results. Third-party facilitation will help provide an open forum for debate. If you have all of the necessary parties involved, with all stakeholders present, there will be no need to put off decisions until the “appropriate person” can be brought up to speed.

At the conclusion of the strategy session, you will want agreement on the following:

- **Technical architecture/standards.** Although you have not yet selected a product, there are certain architectural concepts and standards you will want to agree upon before moving ahead. Some potential standards to consider include database, operating system, and authentication/security. If you cannot get agreement on these topics, a qualified team should be identified, appointed and empowered to create and police the standards.
- **Business process updates.** An ECM solution forced into your current business processes is unlikely to deliver the results you want. Identify any major business process updates that must happen in order for the initiative to be successful. Challenge your current processes and move to simplify.
- **Roadmap.** This document shows the entire project, as well as the time required to complete the top-priority initiatives and meet your success criteria. These will be high level estimates, but will show what needs to be done — in sequential order — to be successful.

During the execution phases of the identified initiatives, there will naturally be conflicts, and you will have to make updates to the technical standards, business process and the roadmap. The conflicts should be handled by escalation to the Governance Committee. The Committee’s understanding of the primary goals and objectives and the projected future state will enable it to resolve the issues and distribute updated information as appropriate.

## 6. BUILD AWARENESS AND SUPPORT

Getting buy-in from all levels in your organization and setting realistic expectations with regard to scope, timeframe and resource involvement is critical to the success of your initiative. Without the support of the people whose jobs you are going to affect, you will still have an uphill battle in implementing a content management system. Use the information you’ve accumulated to explain the challenges with the current state, how you see the future, and what your plan is to make things better.

It will also be important to show the entire content lifecycle, so people can better understand how what they are doing affects other areas in the organization. The work you have done in the future state step will provide a solid foundation for creating this information.

Build support by conducting face-to-face sessions with end users with the project champion and members of the Governance Committee present. Do not make the mistake of assuming people will simply buy in to an executive mandate.

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## CONCLUSION

Now you are ready to move on to the implementation initiatives. Depending how you envision your future state, these initiatives may include:

- Data standardization
- Creating a global taxonomy
- Product evaluation
- Repository consolidation
- Business process updates
- Content management system rollout
- Training and support

Be certain to build a solid foundation for these future initiatives; it is the only way to ensure that you will achieve the results you envision.

Enterprise content management cannot be handled by a single group within an organization, or in multiple groups acting independently. It is a complex business problem that affects almost everyone, and effective organization-wide solutions require executive level support, clearly defined company wide objectives, and buy-in from all stakeholders. Following the six steps outlined above will help ensure that you have that solid foundation.

Molecular, an Internet consulting firm, designs and builds digital solutions to help companies increase revenues and decrease operating costs. Since 1994, Molecular has directed successful Web initiatives for the nation's top companies, including The Finish Line, Inc., Fidelity Investments, MFS Investment Management, Hewlett-Packard and Talbots.