

white **paper**

ECM Strategy for Lasting Change

This paper outlines how to incorporate content strategy techniques in a way that drives success for ECM platform projects, aiming to ensure impactful, lasting change.



INTRODUCTION

More than any other part of executing on enterprise content platform projects, strategy planning is often the most neglected. So many organizations spend months, maybe even years working on RFPs, analyzing spreadsheets of features, and participating in vendor demos to select the most appropriate technology platform for their organization. And then—possibly due to excitement, impatience, or pressure over signing on the line for a major software platform purchase—these same organizations barrel into installation and implementation of the platform. After all, most have had a failing platform in place for years, and it's way past due for replacement.

Many organizations believe they know intricately how their business functions, and with all the spreadsheets of features and functions in hand, are itching to get the new technology in place to support it. But therein lies one of the biggest mistakes in rolling out ECM platforms; one that in my experience, accounts for the most rescue or redo projects in this space. I call it the circumstance of “getting going before knowing.”

We'll be publishing a series of posts on the topic of ECM strategy covering useful techniques to employ throughout the lifecycle of projects, not just as an exercise to begin and be done within the early stages. I hope to give you several key things to think about with each post, and tips to get you going in the right direction when traction is slipping. Feel free to add your thoughts, suggestions, and comments as we go along.

Some of the topics covered in this paper are:

- Planning for successful technology change
- Executing on the top things
- Measuring value and success of what's been done
- Anticipating your next technology change
- Sustaining technology success

PLANNING FOR SUCCESSFUL TECHNOLOGY CHANGE

It may seem obvious, but the first thing to start with when embarking on a significantly large ECM technology change, platform refresh, or software upgrade, is a strategically informed plan. Many organizations don't do this well or skip it entirely.

Everyone may think that your enterprise project has the green light to begin implementation when procurement finally signs on the dotted line; however, that doesn't mean you have a map for the inevitable challenges ahead. To be successful, every project has to start with a clear picture of the Why, the Who, and the How.

WHY ARE WE DOING THIS PROJECT?

At the outset, this seems obvious—especially if you've spent a year or more researching the right platform to put in place. When I inquire about success criteria early on during engagements with clients, I usually get reasonably straightforward, yet vague answers such as:

- We have to replace the previous, unsupported system.
- We are rolling out a technology change or refresh to meet growing business needs.
- With minimal disruption to the business, we're building a more modern, sustainable platform.

All of these are perfectly valid ideas. However, these statements do not provide you with a clear understanding of what you are setting out to accomplish. Like weak user stories in an agile project, these statements are too high level, missing acceptance criteria, and not very motivating!

As a better example, here are some ECM project success criteria that were developed for a medical research company to

streamline the paperwork required to start up a new pharmaceutical study. Stronger success criteria should sound more like the following:

- Reduce the person-hours required to generate, distribute, sign, track, and file regulatory documents and forms by 50%.
- Reduce the overall cycle-time to generate, distribute, sign, track, and file regulatory documents/forms required for a pharmaceutical study start-up from two months to 10 days.
- Be compliant with all federal regulations as documented by the Director of Regulatory Compliance.

Getting to the goals and success criteria of the project will guide you time and time again as you set priorities, navigate through roadblocks, and make tough decisions about the project. When questions arise or issues come up, weigh the answers and mitigations against the success criteria. Believe me, when there seems like no perfect answer to a tough problem in the project, you will find comfort in gauging a decision against these criteria to guide you forward.

STRATEGY DESK TIP

Struggling with success criteria? Start with a list of what you simply can't miss doing. In other words, what are one or two of the big things that if the system didn't do or couldn't support, would cause it to fail? Write down what is critical and describe how it will work to empower your business. AND, think ahead to how the success of that feature can be measured.

WHO IS WORKING ON IT?

Once you have the core project goals figured out, defining the right roles and skillsets to execute the project will be the next big challenge. If an ECM solution has been in place there may be existing staff available to transition into roles on the new solution. However, there are two precautions to taking this approach. First, it may be that the team already in place won't be relieved of their current responsibilities on an existing platform unless some tough decisions are made to stop working on or supporting the platform. Many times, this isn't an option, so backfilling roles or picking up new resources to work on the new platform may be necessary. Stretching people too thin between the old and new solutions may not set a team up for success.

Second, it is critical to review the new roles needed on a new solution. Are the foundational skills and technology stack the same, or are new resources needed that have different skillsets? Do some people need training in new areas? Starting with role definitions for the new platform in a neutral way—meaning starting with the roles needed, not the current resources available—should be started as soon as it is known the direction that the platform is going. It may be that some of the resources available currently will have the right skills, passion, and bandwidth, but know your resourcing roles and responsibilities before filling the needs with the current ECM team members.

STRATEGY DESK TIP

Remember, team creation is more an art than a game of Tetris. Clearly define the roles needed to staff the project and fight for the correct people to fill those roles. You may have to have a discussion about hiring or getting contractor help where you have critical gaps.

HOW WILL WE GET THERE?

Hidden inside this is actually another question. In other words, executives more commonly want to know, "When will it be done?" To avoid the pitfall of talking only about dates projected on an overwhelming gantt chart, ensure you have all the project data points (clearly stated requirements, dependencies, and integration points) and can accurately answer how the team will build what is needed. I'll share much more on how to get there in my next post.

STRATEGY DESK TIP

Following a solid methodology is a skill that newly formed teams need to learn and adopt. Above all, set priorities, communicate regularly about expectations, and encourage cross-team collaboration.

DISCOVERY AND ASSESSMENT

The Zia team has been working to drive strategic ECM projects for over a decade. The more we learn about ECM, the more we realize that our most successful projects have started with a solid understanding of the project, the team, and the plan to get going. We nearly always start with our discovery and assessment, even on the smallest of projects. If you believe your project is small enough to accomplish in eight to 12 weeks' time, you should still take about a week on the front end to strategize and plan the why, who, and how. If you are replacing a system that has been in place for five years or more with hundreds or thousands of end-users, we highly recommend spending at least three to four weeks to get the right plan in place.

STRATEGY DESK TIP

To kick everything off in the right direction, you may need the help of a talented facilitator. Find someone you trust with the right skillset, inside or outside your organization who can lead you through discovery sessions.

KEY TAKEAWAYS:

- 1 Discover your success criteria: It is critical that you know what success looks like. And, guess what? I bet success isn't illustrated by the system you have in place today, so don't rely solely upon that as your blueprint.
- 2 Invest in the right team: Team members have to have the talent, desire, and time to participate and contribute to the project.
- 3 You need more than a calendar-driven chart: The plan is more than a Gantt chart. The plan includes milestones, quick wins, building blocks, user engagement, and a clear methodology for delivery.

EXECUTING ON THE TOP THINGS

As you begin executing an ECM project, there are going to be hiccups and all-out fires. Risks turn into issues, requiring mitigations, new decisions, and so on and so forth. You may start thinking, "What happened to our strategy?!" One of the most important things you need to do, in times of project stress, is reminding your team to apply the basics of your strategy throughout all phases of execution of the project. It's very easy to be distracted or get off track due to delays, scope creep, and unexpected issues. However, what's important is not what comes up (because things will come up!) but how you get through it. Remember all the work your team did in the previous stages—that success criteria and planning? Use it! Apply it! In every situation, weigh the next steps against the strategy that you originally set out for your success.

VALIDATE YOUR READINESS TO EXECUTE

Before you roll into implementation, stick to the framework to execute on project excellence. Are you prepared? If so, you have answers to all the key items from my last post—Why, Who, and How. A checklist for readiness looks like this:

- Success criteria are agreed upon with stakeholders before the start of the project.
- Collaborative working relationships are on the way to being established for all the assigned resources. The project owner (or sponsor) and the project manager are in sync and guiding the team.
- The project is set into motion with an overarching review of the initial design and resulting plan with architects, IT support, and other key services teams and stakeholders (as needed). Discussions and whiteboarding sessions are held to build a set of designs for the project's phases. The outcome of this work includes the following types of items:
 - Design diagrams and documents
 - Solution infrastructure and scaling recommendations
 - Big picture view of project milestones
 - A backlog of user stories for the high-priority implementation items
 - Work breakdown of the first few sprints of work
 - Communication plan and meeting cadence determined
 - A list of out-of-scope areas for further discovery to be discussed in later phases

STRATEGY DESK TIP

It's critical to have a clear set of success criteria identified. However, do you know how you are performing against those criteria today? Set a baseline for the current system performance to ensure you can measure progress. The baseline could also point out gaps in how you will quantify your success criteria overall. You may find early on that you do not have a way to measure your end goal. Better to know this and account for it sooner rather than later!

A METHODOLOGY FOR IMPLEMENTATION

Once you've checked off the readiness items, adopt a methodology for making progress on your milestones. Each project and each team is different so there isn't a single, foolproof methodology that works for everyone. The most important thing is to adopt one that works for your team's style, get really good at it, and set a regular cadence for the project. A useful methodology includes these few key things:

- Iterative development cycles to ensure traction and momentum.
- Focus on scope management. The team identifies creep, weighs options against anything that threatens scope, and adjusts deliverables as required.
- A clear set of guardrails for keeping the project on track such as regularly scheduled meetings (daily standup, weekly project status, monthly executive review).
- Paths out of pitfalls including a project manager who is empowered with the flexibility to deal with unforeseen circumstances and dedicated decision-makers who understand the plan and project success criteria when called upon.
- Time for developers to execute but also participate in iteratively planning the next set of work breakdowns for upcoming sprints.
- Time for QA resources to unit test and provide quick feedback while also developing end-to-end tests.
- Regular communication with, and involvement of, key stakeholders.

The Zia methodology has been fine-tuned over the last 10 years to deliver industry-leading solutions. During the heavy lifting of implementation phases, we plan and run development sprints, each for a set period of time, during which

specific work is to be completed and made ready for review and initial testing. The project owner and the development team agree upon the exact work to be accomplished during the sprint. The sprints are tied to a higher-level set of milestones to ensure cadence and velocity meets goals and expectations. Each sprint is completed in a specific set time (generally one to three weeks) with the following type of deliverables:

- Business analysis documentation, feeding sprint planning, and development
- Estimates and work breakdowns of user stories for each sprint
- Delivery of working code
- Sprint demo to core team and key stakeholders
- Technical walk-through and code reviews (where applicable across development resources)
- Testing hand-off instructions and test script development
- Assistance and education of stakeholders through simple cases for sprint acceptance testing
- Strategy check! Are we building to the plan or getting off track? How are we doing against the larger milestones?
- Beginning and continuing work on overarching project communication and developing a change management strategy
- Rinse and repeat for each sprint cycle

STRATEGY DESK TIP

During planning and design, you found out what motivates and provokes your stakeholders. As sprint demos start, you may need to reset stakeholder's understanding of the success criteria. Make sure each sprint demo is carefully planned to show how it supports the objectives originally agreed upon. Stakeholder feedback should always be listened to and responded to promptly but also measured against the degree to which each stakeholder can influence the project. Regular discussions are appreciated and could soften the blow when you need to push back on scope creep and change requests.

Once the development cycles of each phase of the project are complete, time should be allocated for hardening and rollout. This step includes final UAT, bug fixing, and tuning. Typical deliverables are:

- Hardened code and infrastructure for entire phase
- Resolving priority 1 and 2 defects
- Delivering subject matter expert training to prepare for final-user acceptance testing and user training
- Performance benchmarking and tuning
- Document phase solution architecture, key configurations, and customizations
- Cutover, rollout, and go-live planning

STRATEGY DESK TIP

No matter how well thought out the methodology, one of the most important parts of execution is an emphasis on great communication. Many times, individuals are highly accountable for their tasks—and great at executing—but fall short at actually talking to one another. Teams that break down reporting structures and thrive on openness and collaboration continually foster cross-team communication once the execution of the project begins. This means talking to one another, sharing and showing each other's work, and having discussions up, down, and across reporting chains. This is what I call all-ways communication—communicating in all directions, all of the time!

KEY TAKEAWAYS:

- 1 Check your readiness to execute: Ensure that you can check off all the key items from your planning stage. Projects that execute well refer back to the basics when bumps in the road come along.
- 2 Follow a methodology: Research and adopt a methodology that works for your team. Some organizations have cultures where pure agile won't work. In other cases, teams can be bored and frustrated with lack of progress while in waterfall timelines. Adapt a pure methodology or a hybrid one, but be consistent and communicate!
- 3 Communicate, communicate, communicate: It may be painful at first for some team members, but fostering communication is arguably as important as doing the work breakdown. Remote teams need this even more and there are lots of tools you can use to help.

MEASURING THE VALUE AND SUCCESS OF WHAT'S BEEN DONE

A wide variety of articles can be quickly found online with ideas and instructions to develop a cost/benefit analysis for an ECM rollout. Most of these articles focus on: 1) initial justification of implementing an ECM system, and 2) a whole lot of numbers in complex spreadsheets consisting of hardware and software expenditures, personnel costs, operations, maintenance and support, and more. Dry and complicated? For sure! But in some organizations, these justifications can't be avoided and are required to get your ECM project off the ground. The core of these calculations require some analysis of these areas:

- Total benefits:
 - Increase: profit, growth, retention, efficiency, visibility
 - Decrease: costs, time, effort, complaints, attrition, risk, conflict, duplication, administrative burden, infrastructure
- Project rollout costs
- Mapping benefit and cost projections
- Calculations of financial metrics

If you're looking for a blueprint for this sort of ROI calculation, you may want to search the web for a useful spreadsheet to get your justification started. In fact, if you run a simple Google search for "ECM ROI," you'll find various resources. But, better yet, search for "ECM Myths" and the results will probably show an article titled, *The 5 Myths about ECM ROI*. While the article was written a few years back, there's one myth that completely resonated with me and is still relevant today:

ECM ROI MYTH: *Total ROI for an ECM implementation can be identified upfront and accounted for in advance.*

Correct! Past the initial project justification, and over the lifecycle of an ECM platform, measurements of value should continue. The continuous value gained from a well-architected and strategically-driven ECM implementation is actually more interesting to measure. It builds momentum in the business and motivates employees.

So, the initial ECM platform implementation should provide cost savings upon rollout—and it darn well better or those folks involved in it may be looking for new jobs! But a well-adopted system gains credibility and momentum as it matures, and in turn, drives ongoing business process improvements and risk mitigation that may not have been accounted for in

the initial calculations of the ROI. The future of the platform and continued funding for operations and enhancements is dependent upon the continuous value of the ECM platform, not just the initial value of it. Therefore, the ROI should be continuously measured. To do that, you need to dig into the details.

MEASUREMENT AND MOMENTUM

In order to illustrate the ways in which a project can evolve from original measures, let's talk through some examples. In working with a specialty insurance company on an ECM project, the team originally set out to deliver an enterprise-wide ECM. The core of the project was focused on success criteria such as:

- Refresh the content platform technology stack
- Replace functionality 1:1 (do not break how the business works)
- Focus on IT-centric gains (less maintenance and easier supportability)

This criteria (while very high-level) was something the team could justify and measure. It began as a pure ECM focus: capture, manage, store, and provide document access to employees.

As the project progressed, we shifted our focus to critical business process management (BPM) improvements. In other words, we didn't just refresh the stack and put in a new backend, we focused on streamlining complex business processes, rather than just on storing and accessing content. The original ROI didn't account for any of those improvements, but the gains were monumental.

EXAMPLE 1: MAILROOM AUTOMATION AND WORKFLOW CREATION

Original Process: The company used to follow a very manual flow of paper through the organization:

- Paper mail received in the mailroom each morning
- Workers opened, sorted, and put mail into the appropriate bins
- Mail was delivered to the departments within the company

These pieces of paper mail were:

- Further sorted by departments
- Delivered to employee mail slots or directly to people's desks
- Indexed by hand with pen and paper or by hand-entering data into systems
- Stacked up with covers sheets and delivered back to the scan room
- Back scanned (scanned at the end of the process) and queued to be re-indexed electronically

The process was repetitive and inefficient, and managers could not easily redistribute the workload as they lacked good insight into the manual workflow process.

New Process: After the new system was in place, and the business process was re-architected, it is much more streamlined:

- Paper mail arrives in the mailroom where it is stacked to be automatically opened and sorted
- Upon scanning, it is ingested into a capture tool where it is classified and key data is extracted into metadata fields
- It is then automatically routed into electronic indexing queues in the repository
- Indexing data is validated which triggers workflows for employees in the system

Now, the process is streamlined and managers have an electronic dashboard of the workflows the employees are working. Redistribution of the workload can be done by reassigning tasks with a few clicks.

EXAMPLE 2: STORAGE OF DOCUMENTS IN APPROPRIATE SYSTEMS

Original Process: Employees upload documents to two (or more) systems, such as the ECM (for retention) and a claims management system (for claim processing).

- Documents may be scanned more than once to be ingested in multiple systems, causing duplication of work (indexing of the documents) and storage into different systems
- If documents were received electronically (via email or fax), a claims adjuster would upload files to multiple systems

New Process: Employees index files with the appropriate metadata once and the documents are distributed as electronic references (links) using integrated content services from the ECM.

- Any documents scanned or received are uploaded and indexed once
- Critical documents are referenced using key metadata in multiple business systems from a single ECM source

EXAMPLE 3: DOCUMENTS TO BE SECURELY SHARED WITH EXTERNAL RESOURCES

Original Process: Paper forms are sorted and stacked in boxes for a courier to pick up. Daily these documents were picked up, scanned, and processed by a third-party servicer at significant cost to the company.

New Process: Forms of a certain type are classified and flagged for electronic delivery. Once index data is validated by an employee, the documents are queued for secure, electronic delivery to the third-party servicer. The new process saves courier costs, scanning charges from the third party, and overall time to process.

Summary of ongoing value: what can be measured as the system is maturing is much more compelling:

PAIN POINT	PREVIOUS MEASUREMENT	NEW MEASUREMENT
Sort, route, and take required action from paper mail that is received.	Paper mail took hours or days to receive, process, and create actions.	Paper mail is digitally transformed and workflows for new actions are created in less than 15 minutes.
Electronic documents stored and duplicated in multiple systems.	Documents are stored in ECM and duplicated in other systems, such as claims management system increasing eDiscovery risks and doubling storage requirements.	Documents are routed and actioned while integrated content services provide links in claims management system to documents in the ECM. This provides a single source of record which reduces risk with simplified records retention and half (or less) of the storage needs.
Sharing medical forms and documents with a third-party servicer is time-consuming and costly.	A daily courier service picked up and delivered paper documents resulting in significant cost to deliver, scan, and process.	Documents are delivered securely and electronically at a fraction of the cost.

REDUCING THE RISK THAT YOUR ECM ROI FALLS SHORT: ZIA ADDS VALUE

The examples above illustrate a few benefits of the business process improvements that have helped to continually add value and justify ongoing investments in one specific ECM platform. There are more examples, and frankly, more work to be done to continue the success of the ECM platform described above. As we know, overall project failure is truly the biggest risk to your ROI. Zia specializes in rescue projects and remapping expectations to guard against having an ECM project that simply falls short of expectations—original calculations of ROI numbers or ongoing business process-driven ones. Zia works with your team to assess and decrease risk. Throughout your project, we work hard to:

- Discover any risks unique to your organization and your project
- Plan and mitigate risk to reduce project issues and minimize impacts
- Determine the best way forward if needing to address any risks (leveraging your team and ours)
- Continuously help you measure and articulate the value your ECM platform provides

KEY TAKEAWAYS:

1

Initial ECM ROI calculations may only help you determine: 1) Should we do the project at all? 2) What is the initial investment for the platform? 3) What priority does the project take? It won't tell you the total ROI over the life of the ECM platform.

2

Uncovering ongoing value: Discover how the business teams are using and adopting the platform and continually quantify the improvements. If the ECM platform is well architected, there are going to be emerging benefits throughout the enterprise. Finding these and measuring them helps you continue to gain support and momentum for the future of the platform.

3

Don't be plagued by risk: The number one killer of ROI is risk—known and unknown. More than any other factor, not addressing risk could result in overall project failure. In addition, never settle for a mediocre ECM platform! Zia can help you succeed, as well as assist in measuring and articulating your success story.

ANTICIPATING YOUR NEXT TECHNOLOGY CHANGE

“It must be considered that there is nothing more difficult to carry out, nor more doubtful of success, nor more dangerous to handle, than to initiate a new order of things.”—Niccolo Machiavelli, “The Prince”

I've seen this quoted in various settings before. Machiavelli wrote these words in the early 1500s to provide advice—his rant being potentially harmful or immoral—to a new prince attempting to establish rule in the 16th century. Yet today, in the minds of leaders who are driving strategic initiatives across the corporate landscape, these simple words continue to carry cautionary weight. Modern technological change is ongoing and when it comes to your ECM platform or any large enterprise system, the preparation, planning, and continuous management through change is key to the health of your systems and team members.

In the other articles of this blog series, I've focused on planning, implementing, and measuring ECM “projects.” However, once the main rollout project is complete, many things bring about change in an ECM platform. Many argue that if your ECM platform isn't changing, it's probably slowly dying! So continuous change is key to its survival. How can you ensure your ECM platform can adapt to change and continue to thrive? Here are a few key things to keep in mind.

FIRST, ENSURE YOUR HOUSE IS IN ORDER

The best way to know how to deal with change is to know what you have in the first place. Think of this one as essentially saying, “OK, what have we got and how is it performing?”

You should regularly conduct health checks of the ECM that include everything from hardware and software, to network systems and integrated platforms. This allows you to see and know what you have and, more importantly, what you may lack. With any pending change, you’ll be better informed on where and how that change could affect what you have in place. (And whether that change is even a good thing!) Knowing your baseline also helps you to understand whether a change itself is impacting your system or if there were other things going on with your platform before changes were introduced.

STRATEGY DESK TIP

Zia offers a Health Check engagement provided by an experienced engineering consultant which analyzes your existing hardware and software environments. The engagement looks into pain points, resource usage, scalability, troubleshooting common system issues, and makes recommendations for improvements. Depending on your environment and current installed solution, the health check may provide:

- *Architectural diagrams and validation*
- *Hardware architecture*
- *Supported platforms and versions validation*
- *Repository health*
- *Database validation*
- *Index statistics*
- *Memory validation*
- *Log file analysis*
- *Add-ons, customizations, or extensions review (high level)*
- *Backup and restore procedures*

At the end of the health check, you will be provided with a summary of your environment, feedback, and follow-up recommendations to identify and prevent any potential issues on the systems.

NEXT, BE PREPARED BY HAVING A SEAT AT THE TABLE

The best way to know that change is coming or—better yet—to guide how change comes to your team is to know what the other teams across your organization are doing. As an IT executive, architect, or specialist, being involved at discussions during regular business strategy meetings allows you to hear about things that could impact the ECM either near-term or long-term. Sometimes, it’s just a matter of listening in. Other times it’s a matter of asking the right questions that others, who are not as in-tune to the finer points of ECM, may not know to ask.

Take the example of upgrading or rolling out a new business system like a customer relationship management (CRM) system. Perhaps the ECM team isn’t involved with the technology choice, planning, or rollout of the CRM. However, when a business team member mentions that they’ll just be storing customer contracts in the CRM because it has a content management module, your ears should perk up. This is certainly a topic to discuss and understand with the right folks at the table. There may or may not be a right or simple answer, but I’ve heard more than one story where it would’ve been easier to discuss ECM integration points near-term rather than an intensive and costly migration of content years later.

Simply “listening in” to discussions with business teams can help guide the right change to be brought to the ECM platform and weave it into your overall strategic vision. You don’t need to make every conversation into an ECM conversation! Just think about how the ECM weaves into, or is impacted by, the other systems and platforms within your

enterprise. This keeps your platform adapting with the business.

LASTLY, PREPARE YOUR PLATFORM FOR GROWTH

One of the ways change sneaks up on your ECM platform is growth.

Wait, when did the system regularly start ingesting 50,000 new documents per hour!?

If the platform isn't prepared for growth, it certainly isn't prepared for the change that is required as a result of that growth. Remember, growth is an awesome problem to have, as long as you are ready. Your team and platform need to be aligned to deal with new customers and volumes.

Make sure you know what your system is capable of and what differentiates it as a platform. You should be able to articulate how the platform should and should not be used. This drives decisions that affect how your ECM platform is managed overall. If you haven't already, you should write down a set of guiding principles for the ECM that are its "differentiating capabilities". These capabilities guide areas of growth for the ECM and are areas that are regularly pursued for growth, while areas that don't fit are resisted. Then align your budgets, spending, and cost-cutting with those capabilities.

STRATEGY DESK TIP

Guiding principles for your ECM should complement your overarching enterprise goals and echo the business value you are driving with your platform. These principles could be looked at like high-level rules that are followed to guide the architectural implications of investment and design decisions. Example of some ECM-related principles:

- *Reflects vision of improved ways of using technology to benefit business*
- *Reflects high-level business and IT requirements in a commonly understood way*
- *Delivers the right content at the right time, to support decision-making in the right business application*
- *Creates a customer-focused environment supporting multi-channel content delivery*
- *Enforces regulatory requirements such as records and archival management*

Your guiding principles might be different but, in order to be meaningful, principles need to be shared and authorized. This takes time. You may want to set up a team or working group to handle building and sharing your principles.

And of course, plan big-picture goals with realistic resourcing plans to match. Know what you want to keep—and why. Know what you want to change—and how. Always set clear, achievable plans and deadlines for executing on new changes, and manage through the complexities and challenges to keep moving forward. The key is showing that your platform can undertake change and get stronger, instead of falling apart.

Change comes in all shapes and sizes. Perhaps the change on your team's horizon is daunting, such as managing large migrations through a sizable merger or acquisition. Or maybe it's subtle, where current business teams require a few key enhancements so they can work more efficiently. Either way, hope for sliding through change with a stable platform isn't enough! Prepping, shaping, recognizing, and getting in front of change allows you to attack it and reap the benefits.

METHODOLOGIES FOR DELIVERY SUCCESS

While a lot changes in business, one thing stays consistent: the imperative to serve customers and employees, and to grow your business. One of the ways to meet that imperative—in the face of never-ending digital disruption—is to strategize with people like those of us from Zia Consulting. We strive to bring together the best solutions for all those diverse, disruptive experiences across verticals. Whether it's insurance, mortgage and banking, corporate legal, manufacturing, high-tech, or something else, we've had lots of conversations with recurring themes. Zia Consulting uses a modified Agile implementation methodology anchored by three key principles and grounded by milestones.

BEST PRACTICE FRAMEWORK

The first principle is an overarching set of solid best practices. From talent selection and staffing to development practices and deployment techniques, each area of the project should have a set of operating guidelines. For example, at Zia, we use requirements gathering standards of practice, specific code development and delivery methodologies, and agreed upon communication mechanisms and toolsets. We leverage models and techniques across disciplines, grounded in the standards developed by the Project Management Institute (PMI).

VISION SHARING

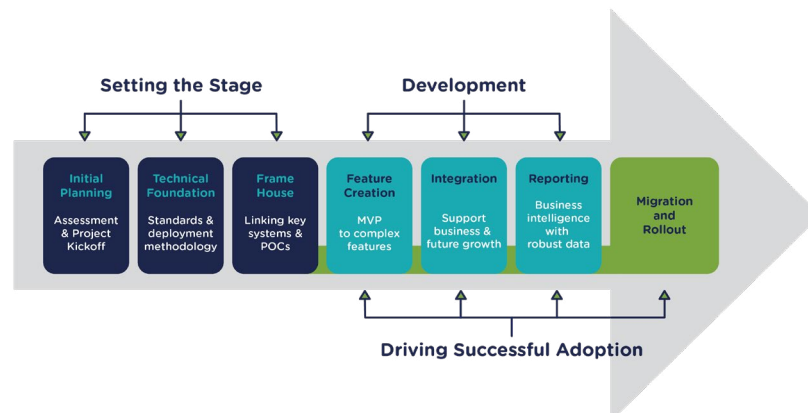
Vision sharing sets the stage for any project or program. During initial vision sharing, a focused, timebound discovery phase establishes the goals, sets success criteria, and assembles the right team. Underlying business and technical pain points are uncovered and documented. This activity sets the stage for project success and user adoption based on a shared view of the future.

PLAN, DO, TEST, DO-AGAIN

After discovery, we adopt a “plan, do, test, and do-again” cadence. Planning is based on milestones set from priorities. It's important to begin implementing the initially-scoped ideas while continuing to tackle the unknowns that were stumbled upon during discovery. In addition to delivering functionality, each iteration contains demo, testing, and feedback loops, allowing the team to adjust and respond to key feedback. Each cycle is short and involves early adopters. This allows for adjustments to be made along the way with less impact on the overall timelines. In other words, the process should keep the team from iterating too much without involving the right groups to weigh in, lest you find that you're addressing the wrong pain points or (worse!) introducing new ones too far into the development process.

MILESTONES

For milestones that are foundational for success, we focus on the end to end pieces of setting the stage and development while pulling in the items we believe will drive successful adoption. While this diagram reads left to right, and looks linear, many of these steps are iterative and, from a timing perspective, one milestone can begin before another one is completed. We have found these components to be core to any technical project, especially those involving business process changes.



Setting the stage includes agreeing upon a foundation and framing the project within the landscape of the entire enterprise. Initial planning includes validating the team's readiness to begin the project. There are going to be challenges ahead! The first plan needs to serve as a roadmap to getting through (and around) those challenges.

STRATEGY DESK TIP

ECM projects are complex technical undertakings. Therefore, setting standards for the development methodology and deployment early saves confusion and wasted cycles once sprint deliverables are ready. Is the hardware specified and procured? Are members of supporting staff like DBAs, network and storage engineers, and identity/security representatives committed to the project? Is there a release and deployment manager, responsible for the planning, design, build, configuration and testing of all software involved? As with other aspects of ECM projects, deployment design is as much an art as it is a science and each of our clients have specific procedures and processes.

Our next milestone, frame the house, represents how the ECM relates to and integrates with other systems and related projects within the enterprise. Whether mapping out a system integration or simply proving out a unique and new business process for the end user, here's where we establish the ECM project's role in the enterprise and understand its impacts to other related systems. Enterprise integration doesn't just mean system, data, and metadata synchronization; it also requires process-based changes. Framing the house stage may include a proof of concept to quickly validate the to-be system and processes.

Everyone is on the same page now and ready to build the solution. The development milestones tackle the digital transformation, providing new features to support business processes, system integrations, and data intelligence. New features are developed with a minimum viable product (MVP) strategy. MVP is a development technique which provides sufficient features to satisfy early adopters. The final, complete set of features is further designed and developed after considering the feedback from the product's initial users.

STRATEGY DESK TIP

Integration of the ECM with other line of business systems can bring significant value, and not necessarily where you expect! Integrations may be viewed as complex and costly, but we uncover the best technical options and discuss how to gain the most business value from an integration.

Something oftentimes overlooked is the need for reporting, data analytics, and business intelligence from the ECM data. We have learned from implementing content centric projects that the requirements for data intelligence are often only discovered as the project continues. As users start to see information in the system, they discover new ways of leveraging that information. As consultants, we always ask questions about how data points need to be pulled together. Additionally, for reporting and analytics, the requirements are simply not as well defined, even once users start to understand what they want. The specifics of finding and navigating data and how it is to be governed in the data lake are typically not clear ahead of time.

No project is successful without user adoption. That is why throughout the lifecycle—even as far back as the setting the stage timeframe—we take steps to maximize engagement from users. We talk to users, involving them in workshops, showing in-progress to-be diagrams and demos, and getting them involved in testing as the project progresses. The green line on the diagram above shows that managing the shared vision of the future starts weeks and months before new

features are built, systems are integrated, or content is migrated.

Let's chat about your organization's strategic vision and challenges for content management and enterprise integration—not only to share our knowledge but also to learn from yours!

ABOUT THE AUTHOR

Kristen Harris is the Senior Director of Strategy and Operations at Zia Consulting. Kristen has 20+ years of experience in innovative engagement and development of platforms for enterprise content and data initiatives. She is an Agile / Scrum methodology expert and specializes in business process analysis, data architecture strategy, and enterprise integration. Kristen excels in team-building and executive communication, often becoming an agent of change by evangelizing future vision, mission, and goals. She enjoys glamping and paddle boarding and never passes up an opportunity to find the best tacos in town.

ABOUT ZIA CONSULTING

Zia Consulting is an award-winning system integrator of content management, process management, document capture, and cloud sharing technologies. We address the needs of enterprises to better manage, process, and secure documents by automating business processes and enhancing information governance. Our vertical accelerators for insurance, mortgage, accounting, manufacturing, and more are utilized by some of the world's largest enterprises to reduce costs, increase efficiency, and mitigate risk. Visit ziaconsulting.com for more information.

CONTACT US

sales@ziaconsulting.com
ziaconsulting.com
888-732-4101

5525 Central Avenue #200
Boulder, Colorado 80301