

Purpose

This document is meant to be a starting point for writing an Enterprise Content Management Strategy. Segments can be used for individual projects and it can be customized by industry. There are other ways to approach this process. This is just mine.

Don't try to write it all at once. Select a segment that you currently have information on and work through it. Often it's a team effort to get the information you need and a great way to get people talking about how they want to approach these important business decisions.

It's my feeling that as technologist our service to the enterprise is our first and foremost concern. Staying close to that touchstone of a core purpose or mission helps to weed way the erroneous information that bombards us daily. That's why my documents always start with how this project, theory or strategy benefits the enterprise and ultimately the customer.

1. Responsive - Providing Service to the Enterprise

- a. Technology as a company service
 - i. Review of Existing Goals
 1. Examples are
 - a. Increase productivity (content integration)
 - b. Improve customer service
 - c. Facilitate compliance
 - d. Lower costs
 - e. Increase information security
 - f. Improve responsiveness to market factors / competition
- b. Corporate Pain Points
- c. Evaluation of Existing Systems

2. Compliance & Governance

- a. Governance Committee creation
- b. SOX
- b. HIPPA
- c. Information retention policies
- d. Legal (litigation & other requirements)
- e. Executive management review/approval
- f. Enterprise change management policies

3. Features & Functionality

- a. Selection of features that are needed in your environment
- b. AllIM ECM Definition: "ECM is the technologies used to capture, manage, store, preserve, and deliver content and documents related to organizational processes."
- b. Examples are:
 - i. Document lifecycle management
 - ii. Image management
 - iii. E-mail archival & management
 - iv. Collaboration
 - v. Off-line or mobile support
 - vi. E-Forms and workflow
 - vii. Virtual Workspaces
 - viii. Document Libraries including custom columns, classes & types
 - ix. Line of Business connectivity
 - x. Social activity streams
 - ix. Records management
 - 1. Crawling existing network shares (yes/no/sometimes?)
 - 2. Classification
 - 3. Batch operation
 - x. Search
 - 1. Taxonomy
 - 2. Business classification systems

4. Architecture & Integration

- a. Infrastructure, database, custom content architecture, mashups
- b. Selected integration points with legacy systems
- c. Data conversion options

5. Fault Tolerance

- a. Hardware/Software levels
- b. Backup & Maintenance Plans
- c. Fire Drill Schedules & Emergency Procedures

6. Scalability

- a. Immediate and future needs
- b. Amortized costs
- c. Hardware, licensing, service expenses

7. Institutional Knowledge Management

- a. Resource Allocation
- b. Education of internal resources
- c. Balancing internal & external expertise

d. Long term planning

8. Cost & Risk Analysis

- a. Pilot Project Selection
 - i. Process & Criteria

- b. Specific Business Case if available including
 - i. Problem Description
 - ii. Available enterprise tools
 - 1. What you own
 - 2. What you need to buy & learn
 - iii. Costs to Implement
 - iv. Risk Assessment
 - v. Recommendations
 - vi. Next Steps

9. Goals by Quarter for MBO planning

10. Quality Assurance & Measuring

- a. User feedback process
- b. Revision criteria
- c. Defined criteria for success