

<p>Continuity</p>	<p>1. ECM Project and Programme Management</p> <p>Programme Management ECM is an ongoing strategy, involving multiple projects designed to gain control of the organisation's unstructured information. Within the context of an overall strategy:</p> <ul style="list-style-type: none"> Tackle specific projects singly, with each adding business value and addressing a portion of ECM Select projects for business value, not simplicity Produce a business case for each of these programmes separately <p>Project Management</p> <ul style="list-style-type: none"> Identify scope of initiative: geographic, organisation, legacy content to be migrated, information types, information classes, and timetables Plan your project phases, activities, and deliverables Avoid scope creep, but realise that some tradeoffs will be necessary 	<p>2. Information Governance Framework</p> <p>Policies</p> <ul style="list-style-type: none"> Identify the information owner and hold accountable Determine the lifecycle of content. Some must be kept; the rest can be disposed according to your policy Information belongs to the organisation and should be shared with appropriate security & access controls <p>Management - All levels in an organisation are accountable for the information they have control over. Important appointments:</p> <ul style="list-style-type: none"> Chief Information Officer (CIO) <p>Information governance board</p> <ul style="list-style-type: none"> Sub-group of executive board, includes key directors Programme / project owner Accountable to the executive board for delivering expected benefits of ECM-related implementation project/ programme Information Manager Organisational roles needed to manage "corporate memory" and support users, include: <ul style="list-style-type: none"> Information management function Maintains corporate business classification scheme <p>Maintains information and content management policy</p> <ul style="list-style-type: none"> Leads content management community of practice Advises on relevant legislation Defines ECM reference information Ensures information is preserved Carries out disposition reviews Audits staff compliance with policy, standards, and guidelines Scanning centre Information hubs ("iHubs") Information specialists in user groups 	<p>3. Concept of Operations (ConOps)</p> <p>Concept of Operations (ConOps) Facilitates communication and agreement of stakeholders to the ECM vision and leads to permission to begin the project by ensuring that the project contributes to the overall content management and business strategies.</p> <p>ConOps describes:</p> <ul style="list-style-type: none"> Future vision after project implementation Organisational changes and content governance structures New business processes, behaviours, and ways of working Tools, applications, and IT infrastructure needed 	<p>Collaboration</p>
<p>12. Post Implementation</p> <p>Development of content management across the organisation</p> <ul style="list-style-type: none"> Refine / revise existing procedures - refine in light of experience New procedures and processes - exploit new environment Metadata capture Searching & retrieving Revise existing and add new workflows <p>Determine success measurements</p> <ul style="list-style-type: none"> Identify and precisely define expected benefits Establish a benefits management structure Functions, roles, responsibilities and communications Assess value, impact, dependencies, risks Develop a benefits realisation and <p>tracking plan</p> <ul style="list-style-type: none"> Schedule for benefit delivery assessments Develop an ongoing training plan <p>User & System Monitoring</p> <ul style="list-style-type: none"> User training revision Business process changes System functionality 	<p>12 STEPS TO ECM SUCCESS Best practice for implementing ECM</p> <p>RISK</p> <ul style="list-style-type: none"> Risk Card A workgroup has heard about the ECM pilots underway and wants to start a pilot too, GO TO COLLABORATION. Risk Card New regulations announced GO BACK 4 STEPS and review information management policy and ECMS for compliance. Risk Card Successful pilot, GO TO COLLABORATION for the next implementation. Risk Card Intellectual compliance plan for litigation hold, PAY £5 MILLION FINE. Risk Card Email managed by deleting all messages over 90 days or when storage space was consumed, PAY £1 MILLION. <p>BENEFIT</p> <ul style="list-style-type: none"> Benefit Card Enlist the aid of consultants and system integrators in the planning and implementation of an ECM programme. Benefit Card More than "managing" content, an ECM programme is "content at work." Benefit Card ROI for an ECM Programme includes both hard and soft benefits. Benefit Card Charge Management for a successful ECM programme requires communication, training, and ownership. Benefit Card Successful ECM and compliance plan - avoids Cost of Failure. Benefit Card A successful ECM programme must be fully supported by executives at the highest level in the organisation. 			<p>4. Information Survey</p> <p>An information survey provides a present-state of what your content is, where it is located within your organisation and how well it is aligned with business needs. Identifying the location of content improves the business case while clarifying business and system requirements.</p> <p>An information survey helps identify:</p> <ul style="list-style-type: none"> What content and business flows are present Information gaps (what content is not present) How long should it be kept How to rationalise information <p>(eliminate duplication, planning migration, more effective flow)</p> <p>Planning a Survey</p> <ul style="list-style-type: none"> Agree upon the purpose and scope of the survey Decide how to understand the business goals, business processes, activities and required information (e.g., one practical approach to an information survey is to study the flow of work). Agree upon necessary level of details for collections and users Determine how to communicate and motivate managers and users involved
<p>11. Roll-out</p> <p>Pre-Conditions</p> <ul style="list-style-type: none"> Successful pilot Requirements met Users satisfied with systems and ways of working Business case valid "Right" people in project team Project management methods Approval from senior management / stakeholders <p>Plan Create / follow a disciplined roll-out and maintain active communication</p> <p>Checklist of elements to address in the roll-out plan:</p> <ul style="list-style-type: none"> ECM and IT design Training development Data migration User acceptance testing <p>Fall-back plan</p> <ul style="list-style-type: none"> Analyse risk register Develop and gain agreement on scenarios where back-out may be needed Develop and review outline contingency plans Produce a fallback plan and contingency plans 	<p>10. Model Offices & Pilots</p> <p>Model Office Involves users, trainers, content managers, and admin staff to create a new working environment, and develop new procedures and ways of working. It helps:</p> <ul style="list-style-type: none"> ECM software selection Refine functionality and user interface <p>This is more of a laboratory setting, with users away from their desks.</p> <p>Pilot</p> <ul style="list-style-type: none"> Start roll-out of new ECM environment 	<p>9. IT Infrastructure</p> <p>Components When planning, managing, or operating an ECM IT infrastructure using this structured framework for any analysis will help you to ensure all aspects of introducing or changing ECM are considered and addressed. Most organisations have the following IT components:</p> <ul style="list-style-type: none"> Desktop / Laptop / PDA (Other front-end devices - hand held scanner, etc.) Network (include Internet, SAN, LAN, firewalls) Server / Data centre (include external services) <p>Architecture Each infrastructure component (desktop, network, and server) will have an architecture-set made up of:</p> <p>The development architecture - the set of disciplines and tools, each supporting a specific task or set of tasks in the development process for ECM infrastructure projects.</p> <p>The execution architecture - the set of disciplines, tools, and standards required to run an ECM application on the IT infrastructure</p> <p>The operations architecture - the set of disciplines, tools, and standards required to keep an ECM production environment up & running.</p> <p>Capability - Each infrastructure component will have each of the three capabilities</p> <ul style="list-style-type: none"> Process - the process required to function and operate Resource / skill - the right people, right skills Hardware / software assets - the physical assets 	<p>8. Users and User Involvement</p> <p>ECMS needs to hold many details about users</p> <ul style="list-style-type: none"> Each user has one-or-more "role" / category Each user is in one or more "workgroup" Workgroups facilitate access control <p>Information on each user generally includes:</p> <ul style="list-style-type: none"> Contact details Workgroup(s) Role(s) <p>Security clearance</p> <ul style="list-style-type: none"> Access rights by class / folder <p>Users should be involved in the outline of the current situation and needs, and in the trial use of potential ECM systems. Real involvement, not lip service, for involved users is needed for success.</p> <p>Involved users will lead to a good concept of operations and an appropriate ECM system to move into a detailed trial with.</p>	<p>5. Business Case</p> <ul style="list-style-type: none"> Shows how ECM-related project supports business strategy Helps convince senior managers to support project Communicates important information to people in business and on the ECM-related project Provides clear recommendations for making decisions Enables success to be measured and benefits realised Quantified in financial terms Used for cost-benefit analysis in business case <ul style="list-style-type: none"> Financial targets set and subsequently monitored Quantified in non-financial terms Important for differentiating between alternatives Benefit levels may be assessed subjectively Numeric targets set & monitored Non quantifiable or intangible benefits Important for differentiating alternative Levels may be assessed subjectively Targets set and monitored for indirect or "shadow" measure
<p>10. Model Offices & Pilots</p> <p>Model Office Involves users, trainers, content managers, and admin staff to create a new working environment, and develop new procedures and ways of working. It helps:</p> <ul style="list-style-type: none"> ECM software selection Refine functionality and user interface <p>This is more of a laboratory setting, with users away from their desks.</p> <p>Pilot</p> <ul style="list-style-type: none"> Start roll-out of new ECM environment 	<p>7. Business Classification Scheme</p> <p>A business classification scheme (BCS) allows users to file, find, and share information. A BCS is:</p> <ul style="list-style-type: none"> The structure used for organising, accessing / retrieving, storing, and managing information Used to classify documents & records <p>Developing a Business Classification Scheme</p> <p>View the development of a business classification scheme in phases:</p> <ol style="list-style-type: none"> determine your overall approach; create a high-level view across the organisation; build a detailed plan in a pilot; roll out in the pilot area; refine and repeat. <p>The critical success factor of a good BCS is the time it takes users to file or find information</p> <ul style="list-style-type: none"> A BCS will change Involve all staff to obtain many opinions It won't be exactly right the first time. 	<p>6. Business & System Requirements</p> <ul style="list-style-type: none"> Understand and document your requirements Stakeholders' needs must be met Document relevant needs of the stakeholders Align ECM system objectives with stakeholders' target outcomes Enable programme to be scoped, planned, and delivered effectively Develop a requirement document, which will become the basis for the system development design The ConOps outlines the ECM vision <ul style="list-style-type: none"> The information survey describes the business goals, processes, and activities, plus required information If available, use a standard specification organisation to ensure proper structure for stakeholder and survey results Interview senior stakeholders and representatives of the end user community Draft a business and systems requirements specification based on the above. Review until consensus is gained 	<p>4. Information Survey</p> <p>An information survey provides a present-state of what your content is, where it is located within your organisation and how well it is aligned with business needs. Identifying the location of content improves the business case while clarifying business and system requirements.</p> <p>An information survey helps identify:</p> <ul style="list-style-type: none"> What content and business flows are present Information gaps (what content is not present) How long should it be kept How to rationalise information <p>(eliminate duplication, planning migration, more effective flow)</p> <p>Planning a Survey</p> <ul style="list-style-type: none"> Agree upon the purpose and scope of the survey Decide how to understand the business goals, business processes, activities and required information (e.g., one practical approach to an information survey is to study the flow of work). Agree upon necessary level of details for collections and users Determine how to communicate and motivate managers and users involved 	
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Rules of the ECM Implementation Game

Object
The goal of any enterprise content management (ECM) implementation is the effective management of business content. ECM is the technologies used to capture, manage, store, preserve, and deliver content and documents related to organisational processes.

Equipment
Organisations need the following pieces to play:

- A business plan that identifies what content is important in your organisation and how it is to be managed.
- The right team of properly trained people (IT, legal, executive support, records managers)
- The right technology (collaboration, document management, BPM, web content management, records management, capture tools, etc.) to turn the business plan into reality

Game Play
Making an ECM implementation work requires planning and attention to detail. While this may look like a simple, step-by-step process, many of these steps will occur simultaneously. ECM is a complex set of technologies that work together. The best way to create the right solution is to identify organisational goals and priorities. Common drivers include enabling easy access and retrieval of content, as well as reducing risk and meeting regulatory requirements.

Winning
Winning 12 Steps to ECM Implementation will differ for each organisation. At a minimum, placing all of an organization's content into a plan for managing content throughout that content's lifecycle is a baseline of success. Creating and maintaining corporate records in accordance with a compliance plan is success. Generating revenue by more effectively delivering service to customers is success. Saving money by purging hundreds, thousands, or hundreds of thousands of documents from an organization's IT infrastructure is success. One final note: the business and regulatory environment is in a constant state of flux. New products and regulations, improved technology, etc. combine to create a constantly shifting environment to which your ECM plan will need to adapt.

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Nuxeo is the pioneer and leader in Open Source ECM. The company's Nuxeo 5 platform addresses the whole scope of ECM and transforms content into a valuable asset by improving business process efficiency, leveraging teamwork and collaboration and ensuring regulatory compliance. Nuxeo 5 is designed for extensibility, ease of configuration and interoperability within an existing IT infrastructure.
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Quality Publications Drive Product Success - A key component of your ECM strategy
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The Content Group is the one stop source for the provision of integrated Enterprise Content Management (ECM) solutions that enable organisations to gain competitive advantage, improve operational efficiency, ensure compliance and reduce risk.
By partnering with the market leading software providers, combined with unparalleled ECM expertise, The Content Group delivers to organisations the most comprehensive end to end ECM Solutions.
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AIIM - the global enterprise content management association

AIIM (The Association for Information and Image Management) represents your industry on a global basis as the independent voice of the Enterprise Content Management Industry.

The benefits of being an AIIM Professional Member include:

- Free Bi-monthly E-DOC Magazine
- Members Forum
- Best Practice Guides
- ECM Library

Stay informed to get ahead Become an AIIM Professional Member and join the AIIM network

AIIM Professional Membership is designed for individuals in user organisations whether in the public or private sector.

Benefits include networking, educational opportunities, advice, discounts, magazines and a myriad of other resources that focus on enhancing the knowledge of industry professionals.

Professional membership in AIIM will ensure that you stay informed about technologies, provide opportunities to build business relationships and lay the foundation to advance your career.

- Keep up to date
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for further information visit:
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EMC Corporation (NYSE: EMC) is the world leader in products, services and solutions for information management and storage. We help organisations extract the maximum value from their information, at the lowest total cost, across every point in the information lifecycle.
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Hyland Software Inc. is one of the leading independent vendors in the enterprise content management (ECM) software market. The company was founded in 1991 and has more than 600 employees located at its global headquarters in Westlake, Ohio, USA and international offices in Sao Paulo, Brazil and London, England. Hyland and its international network of approximately 200 OnBase Authorised Solution Providers serve in excess of 6,200 organisations in 33 countries. These organisations represent a wide range of industries, including financial services, healthcare, manufacturing, education, retail, transportation and government. Hyland's high customer satisfaction is exhibited by its 97% maintenance renewal rate.
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OITUK Ltd., specializes in providing C-Cube EDM & Workflow solutions that encompass imaging, electronic document and records management, workflow, portal-based business applications and collaboration facilities.
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FileNet, an IBM company, helps organizations make better decisions by managing content and processes that drive their business. FileNet's Enterprise Content Management (ECM) solutions allow customers to build and sustain competitive advantage by managing content throughout their organizations and streamlining their business processes.
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Open Text is the market leader in providing Enterprise Content Management (ECM) solutions, with a proven approach to providing a range of targeted business and industry solutions that integrate with enterprise applications, enabling your organisation to:
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TOWER Software, a proven enterprise content management (ECM) provider, delivers electronic document and records management (EDRM) solutions. TOWER Software's award-winning solutions empower organisations to manage and secure their vital information assets. The TRIM Content() solution is a single, integrated platform that manages business information throughout its complete lifecycle. By relying on its proven domain expertise, strong strategic partnerships, and powerful solutions, TOWER Software enables organisations to improve the accuracy of information on which business decisions are made: maximise efficiency by finding business critical information more quickly and easily; and achieve and maintain standards compliance across industries, resulting in sustained competitive advantage. TOWER Software is a privately held company with operations in North America, Europe and Asia Pacific. For more information, email emea@towersoft.co.uk
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AIIM Enterprise Content Management Certificate Programme

The AIIM Enterprise Content Management (ECM) Certificate Programme is designed from global best practices among AIIM's 60,000 members. The programme covers the strategies, tools and technologies used to capture, store, manage, preserve and deliver information in support of business processes. This programme was developed in partnership with Cornwell Management Consultants and The Oxford Group.

The ECM Practitioner, Specialist, and Master programmes lead to highly regarded AIIM designations. This is a new AIIM standard for industry professionalism and knowledge. By earning these designations, you can call yourself an AIIM ECM Practitioner, Specialist, and/or Master. You can use the associated logo and title on your business card, email signature, web page, etc. The Strategic Workshop does not lead to any AIIM designations.

Enroll in the programme today to get a deeper understanding of:

Why ECM?
ECM Strategic Workshop - 1-day executive awareness workshop
The Strategic workshop provides a clear overview and explanation of ECM and its key components in order to set the scene for the detailed examination of important concepts and actual implementations. It provides you the knowledge and tools to gain ownership and support from senior executives and users.

What is ECM?
ECM Practitioner - 14 online modules or 2-day training class
The ECM Practitioner Certificate Programme covers the information lifecycle and related concepts such as electronic document management, collaboration, business process management, and electronic records management.

How to Implement ECM
12 online modules or 2-day training class
The ECM Specialist Certificate Programme covers the implementation and related processes such as analysing business requirements, developing a business case, and planning the implementation including change management.

Putting it all Together
4-day training class
The ECM Master Certificate Programme comprises main elements from the above strategic workshop and certificate programmes in addition to a case study exercise. The course provides complete coverage of enterprise content management for professionals working in both the public and private sector.

Benefits of becoming ECM Practitioner, Specialist, and Master:

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for planning and implementing ECM
- Discover real world solutions and best practices for challenges you face
- Learn from experts in the field who are able to answer your questions and address your comments

Who should attend:

- Business Managers • IT Managers / Technical Staff
- Records Managers • Information Architects
- Regulatory Staff • Implementation Teams
- Solution Providers • Consultants
- Service Providers

Pricing
Pricing for the AIIM Enterprise Content Management Certificate Programme includes attendance (online or in-person classes) for one individual, an ECM workbook, checklists and resource guide; and access to supporting ECM web courses. AIIM Professional Members receive a discount on all courses and programme rates. Visit www.aiim.org/training for details.
In-house courses can be arranged and can be cost effective where more than 7 people need to be trained. Bulk purchase of on-line licences is also possible.

AIIM Education Advisory Group
AIIM's ECM Certificate programme is designed from identified trends and global best practices among our more than 50,000 members across the world. The content is defined and reviewed by our Education Advisory Groups in the US and Europe, constructed of several member companies including:

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Visit www.aiim.org/training for details

About AIIM - The ECM Association

AIIM is the international authority on Enterprise Content Management (ECM), the technologies used to capture, manage, store, preserve, and deliver content and documents related to organisational processes. ECM tools and technologies provide solutions to help users with the four C's of business: Continuity, Collaboration, Compliance, and Costs.

For over 60 years, AIIM has been the leading non-profit organisation focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire ECM industry - including users, suppliers, and the channel - acts as the industry's intermediary.

As a neutral and unbiased source of information, AIIM serves the needs of its members and the industry by providing educational opportunities, professional development, reference and knowledge resources, networking events, and industry advocacy.

Information about AIIM can be found at www.aiim.org.uk

AIIM provides:

- Market Education** - AIIM provides unbiased information through the AIIM Roadshow (held throughout the UK); Info Ireland (held in Dublin); AIIM Webinars and AIIM Newsletters.
- Professional Development** - AIIM's industry education road map offers business and government professionals a variety of training opportunities. Our ECM & ERM Certificate Programmes provide instruction on the Why?, What?, and How? of Enterprise Content Management and Electronic Records Management via Web-based and/or classroom courses.
- Peer Networking** - Through networking groups, programmes, partnerships, and the Web, AIIM creates opportunities that allow users, suppliers, consultants, and the channel to engage and connect with one another.
- Industry Advocacy** - As an ANSI7 (American National Standards Institute) accredited standards development organisation, and a founder member of the DLM/MoreQ2 committee, AIIM acts as the voice of the ECM industry in key standards organisations, with the media, and with government decision-makers. Our Industry Watch research reports provide intelligent information about user trends and perceptions.

12 Steps to ECM Success - Best Practice for Implementing ECM

Whether your goal is to meet increasingly complex regulatory requirements or to gain faster access to your information, planning is the key to any successful ECM implementation. Following these 12 steps will help you achieve those goals.

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