



Agile ECM as a Shared Service

Once upon a time, many IT departments were strictly maintainers of networks, sentinels of security and custodians of technology. We were guardians of the information order. We kept the lights on, the data locked down and the systems humming. Some departments within our organizations used to think of us as the department of “no.” “No, you can’t put that on my network.” “No, we can’t get to that project for six months to a year.” “No, that integration you want isn’t possible.” Frankly, it was no fun being the “no” department. We wanted to enable the business and improve the bottom line.

So we changed our mindset. We became more strategic and defined our value proposition in new

ways. As information technology executives, we shifted our priorities from providing technology to leading the business by using technology to deliver services. We began to enable—even empower—the business units.

We started schooling ourselves in enterprise information management. We adopted an information governance framework. By optimizing the use of information within our organizations, we saw that we could support decision making and day-to-day operational processes. We knew that we could overcome the traditional barriers to making information available to the enterprise. How—you ask? By making enterprise content management available as component of shared services.

ECM and Shared Services 101

Let's take a moment to look at the history of enterprise content management (ECM). In its early days, content management was deployed to meet departmental needs in certain niches within the organization. It is now recognized as an enterprise-wide need: an infrastructure investment rather than a niche application. Making information available to the enterprise empowers the enterprise.

Many organizations have concluded that if ECM functionality is to be offered to the enterprise, it makes sense to offer that functionality as a shared service—a way to cost-effectively meet the content management needs of large user bases with diverse requirements for various components of ECM functionality. Access to the ECM system is given to newly hired staff members in the same way they are given a computer, a phone and a system log-in.

When we consider the capabilities inherent in ECM in terms of shared service offerings, an initial deployment might include:

- **Content Management.** It's easy for a shared service to be suffocated in content: emails, IMs, paper documents and electronic forms contain information that drive or support business processes and transactions. Content spans multiple departments and software applications, and it needs to be managed and stored in a manner that makes it accessible to multiple systems and staff.
- **Capture.** The concept of information has changed significantly. Think of it as a launch pad for process. It's not just about scanners and image processing anymore—but about ETL and workflow. In fact, information capture often launches a workflow. Capture also means handling multiple content sources—and can be used to sort, classify and authenticate complex document sets according to pre-defined sets of business rules. In the ECM world, capture strategies have moved toward capturing content at the point of creation. But the actual information processing is done centrally. This works well if you are considering delivering shared services via ECM—fewer hands need to touch the content, greatly minimizing errors and exceptions. Capture is often the first component of viewing ECM as a shared service.
- **Storage.** Information both drives process and is produced as a result of process. Once information has been produced, it must be properly indexed and securely stored—typically in an ECM system—for later processing or retrieval.

The Journey: Maturity Models

Like many technology endeavors, setting up shared services delivery with your ECM system is evolutionary. It's critical to know where to start, where you want to go and how you are going to get there. Try developing a maturity model. Like any model, this is an abstraction of current best practices. Maturity models offer a pathway of milestones that will allow you to graph successes achieved by delivering shared services via ECM. A simple ECM shared service maturity model might look like this:

Localize your best practices

The first step is almost always the most difficult. You've got to analyze the processes conducted by your business units. Calculate their lowest common denominator. Figure out which process is most efficient—and then make it repeatable so you can roll it out to the entire organization. Many organizations start with processes conducted by multiple departments like hiring or contracts; many are also finding success with simple variations on case management.

Thoughtfully standardize across business units

Although standardization can have a utopian veneer, it's best to be ruthlessly practical. Look at your metadata models. Consider implementing a master model like the Dublin Core Set. On the delivery side, develop a standardized skill set for your staff. This allows you to bundle competencies and refine your service culture.

Consolidate

A very wise technology deployment expert once explained that the key to excellence in information delivery is to standardize the central system and customize the delivery. This allows your information access to be dynamic. Deployment-wise this means consolidating all of your content into one ECM system and integrating to allow the users to access content through any application. The interfaces through which staff accesses the ECM system are customized based on their needs or organizational roles.

Cost benefits

This is where the economies of scale kick in. You've developed your service level agreements and are rolling out a menu of ECM functions in terms of head-count. It's as simple as counting noses. At this stage your focus is no longer just internal optimization. You are actually creating value for the organization through your service offerings.

Continuous review

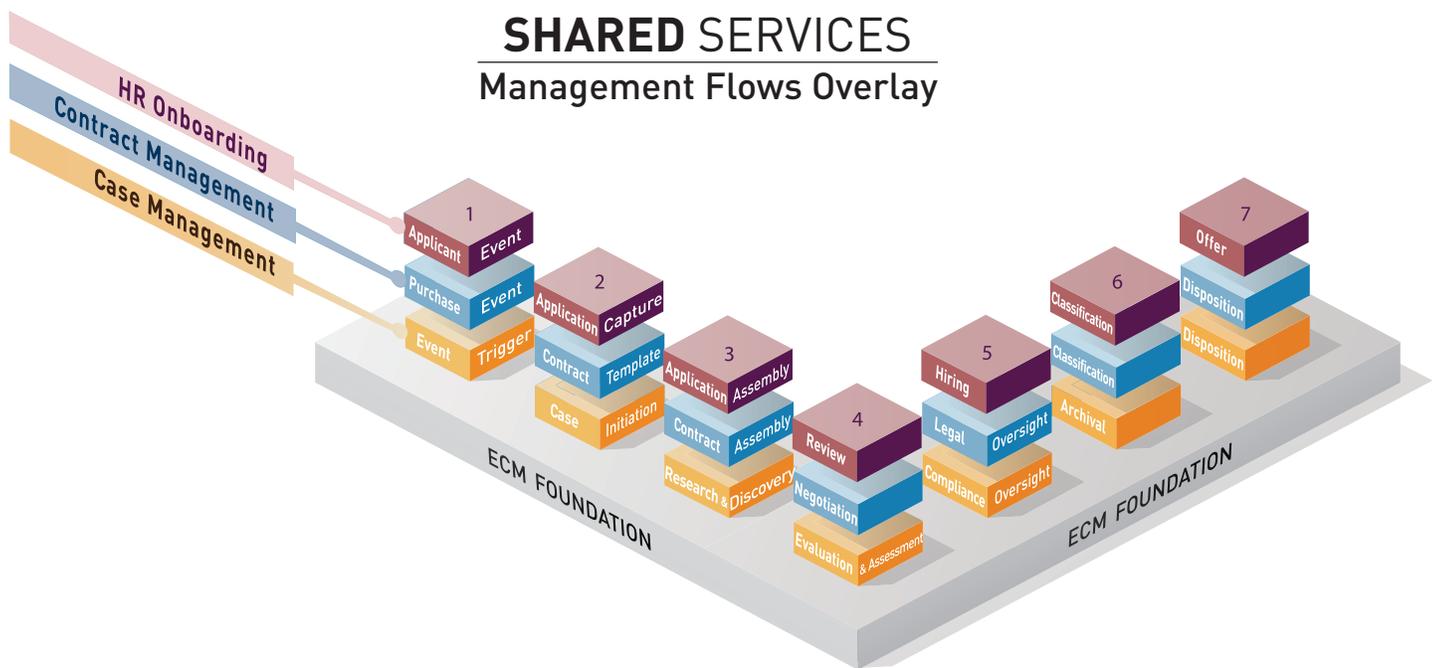
Now that your processes have been optimized and your skill set developed, you must constantly refine your menu of offerings. Auditing is continuous and proactive. Quality improvements are implemented using formalized change management processes like Six Sigma.

ECM and Shared Services for Experts

We've discussed information capture and retrieval as shared services, but that's just the beginning. Once you've got that in place, it's time to start thinking about transactions and processes. The question is: Which processes built on your ECM system should be offered as part of your shared service menu? Consider both the scope and the purpose of the activity. What are the common patterns? Does the activity

generate or protect revenue streams? Does it manage valuable resources? Does it mitigate risk? Does it involve multiple departments and information sources? Is the process repeatable?

The most common processes used as part of the ECM Shared Services model are: HR Onboarding, Client Onboarding, Case Management, Customer Management and Contract Management.



Does It All End Up in the Cloud?

We all know that the main advantage to cloud computing is that companies can reduce IT capital and operating expenses and align their technology spending more directly with utilization. These advantages are strikingly similar to those achieved by implementing shared services. The disadvantages to the cloud—which aren't

necessarily common to shared services—include data ownership, niche integration requirements and agreeable separation. If moving to the cloud makes sense for your organization, consider the ECM Shared Service model as an initial step in the transition.