Content Management Integration for 2015-2016: Enterprise Strategy Evaluation

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CONTENT MANAGEMENT INTEGRATION FOR 2015-2016: ANALZYING THE OPTIONS

01- INTRODUCTION

Most organizations have had some varied experiences installing ECM solutions on projects, department and point solutions over the past 10 to 20 years. Many such initiatives have failed - the failure rate in the industry has been estimated to be around 30% to 50% of ECM projects, for various reasons[1]. Many tend to carry on and experience uptake in adoption, but the number of uniform ECM solutions that thrive across the enterprise is not as high as might be desired, mainly due to complex implementation and migrations. An IDG survey recently said that "59 percent of survey respondents cite 'content integration with other business systems' as their top challenge when implementing an ECM strategy", furthermore complicated installations are commonplace - 72% of studied organizations already had an ECM strategy in place.

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Across organizations, especially those with semi-autonomous departments or regional offices, the result of the difficulty with ECM integration, is that there are many different ECM solutions - forming silos of information. Industry research from both Gartner and IDC, recommends having a single vendor, centralized ECM approach to solve this issue. While that indeed does solve integration issues, it can be unrealistic frequently because of the pre-existing systems already in use. Ripping them out and replacing them with a single vendor approach can be incredibly expensive and highly disruptive to the business.

By putting yourself in the chair of a knowledge worker when yet another ECM solution is rolled out that is supposed to solve all information problems, one can see a repeated yet paradoxical situation. Most organizations are on their second or perhaps third or fourth ECM system. Typically they have been through an initially successful ECM project that was left to deteriorate, then had the inherent problems blamed on outside forces. This pattern is repeated when a new savior vendor is introduced and then it

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[1] *The Why of ECM Failure and the How of Success* – CMW Wire, http://www.cmswire.com/cms/information-management/the-why-of-ecm-failure-and-the-how-of-ecm-success-025892.php

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slowly deteriorates over time, and so on. What remains is typically departmental or point solutions that formed the core of the installed ECM solutions with various vendors and applications, none or few of which that can interoperate.

There are two problems that impact each other in this ECM rollover cycle, which truly could be applied to any enterprise-wide system roll out.

1.ECM rollouts can touch every part of your operations. They have deep impact on how things get done and, if they fail the operational side of the organization, they have insidious impact into the organization's productivity.

2.Most ECM projects are run as just that; a "project" where funds are allocated to the business units involved. Then when it is implemented the contractors and subject matter experts are sent home. There is not enough "plan-do-review" baked into the organization's operations in support of the technology. Business is in steady flux, new divisions are opened, some closed, partner and supply chain process and systems are changed, management structure and governance is changed and the systems that touches everything- the ECM system - had better be able to change with it in an "Agile" manner

So, what are you to do? Here is a summary of the choices. None of them are inexpensive, sooner or later.

02 - WHAT TO DO

1-Leave it to grow organically

This often takes place after the first few years of a new system being implemented. While this situation is inevitable, it can be improved with recurring strategic process improvement, and "central IT" strategy updates.

**Financial Impact:** This has a relatively low capital budget impact.

Technical Impact: Silos grow with heavy reliance on email systems as the de facto ECM system, all with heavy content duplication and difficult search and version control issues. Share Drives continue to grow with difficult search and version control issues and also, to a lower degree, duplication of content files.

Risks: Risk to the organization of sudden impact from multi-million dollar legal matters and compliance issues grows, while the cost of uncontrolled storage increases exponentially. The organization may experience an increasing inability to retrieve and produce accurate versions of information, documents, and records in a timely manner.

Efficiency: Time and ability to find accurate information impacts operations and decision making, lowering effectiveness, transparency and impacting service levels, especially in government.

2-Replace it with new universal vendor solution

This can look good on paper, and is a simple message which can be attractive to management who are distanced from the operations of the organization. The simplicity of having one unified system with little or no integration points does alleviate the complexity of integrating disparate systems, and can put the

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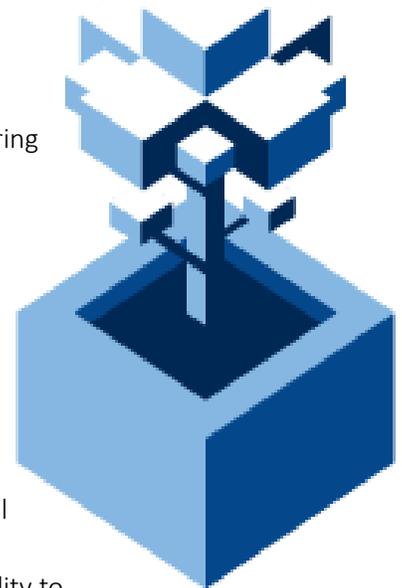
single point of responsibility on one phone number or email address. There is something to be said for this if it is feasible.

Financial Impact: For an organization with embedded ECM systems, the sticker shock of an enterprise wide ECM initiative can be stunning to an organization. Tens of millions dollars or more, over several years, is not unusual for such an initiative. This does not include the disruption of existing business processes during the transition.

Technical Impact: The re-analysis, at a detailed specification level, for a new system sometimes means years of preparation and design work. New systems have different ways of solving business requirements, and must be re-evaluated, leaving little savings from having done it all before. Migration of existing content can also be a very painful process, since when revisiting your existing content you will likely find missing metadata and inadequate indexing of content in older systems.

Risks: The question comes down to: "Why replace existing systems and disrupt operations, especially when there is a risk of failure in the new system implementation." The impacts for having an unsuccessful implementation or ineffective roll-out can be painful.   However that needs to be balanced with a decision to integrate or federate the systems or replace existing systems with a unified ECM system.

Efficiency: Impact to operations could be staggering, if change management and training for knowledge workers and employees on new systems is not taken seriously it can cause long-term issues. This is especially important when there is an existing ECM system in various departments that actually works and solves the local business unit problems.

Having an enterprise-wide view instead of division or department wide views still requires re-work on the data structures, security and access controls and taxonomies across all the departments. You will not be saving much of the existing work when you redo all of the existing ECM system.

3- Use an Integrated or "Federated" approach to integrate disparate departments

Existing ECM systems need to be examined and rationalized- to either stay or be rolled into a central system. If they are working, you can keep them. If they do not have search or records management capability, (such as email, share drives, or ERP systems) - they need to be migrated into a central ECM system and integrated into the existing email or ERP system, especially if the files need to be shared across business units.

Financial and Technical Risk Considerations: This approach involves less financial and operations risk, but the various systems need to be integrated tightly and require a fair amount of significant analysis to understand the existing systems. It's most appropriate for very large units such as international locations of a multinational company, or different departments of a province, municipality, etc. The risks include the issues of multi-vendor environments and the need to bridge disparate system interfaces and data structures. System integrators are key players when talking about integrating a variety of disparate ECM and other data oriented systems. Minimizing the effort for integration and emphasizing UAT and closely managing quality are key challenges in this approach.

That being said, there are three main areas of focus for a Federated approach, and unique technical considerations for each:
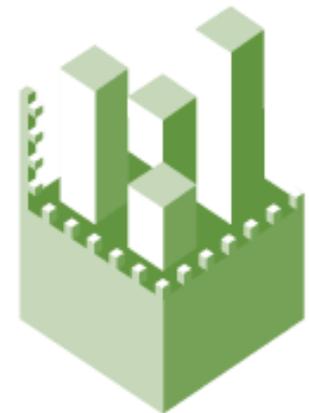
A. Search

Users need to find information from one central location. This needs to be more than just ad-hoc full text search, but a data driven search where the end users can be certain of the results.

Technical Considerations: However, for that to happen enterprise taxonomy and metadata standards need to be harmonized and enforced across business functions and departments. Access control must also be harmonized across departments and organization-wide governance put in place.

B. Centralized ECM

Documents and records stored in Share drives and email attachments, that span departmental processes, should be migrated into a central ECM where uniform access controls and metadata can be harmonized.

Technical Considerations: Thorough migrations are needed for existing systems. This can be done fairly quickly, depending on the implementation methodology and tools used. Other issues can arise based on what system is chosen – the most cost effective solutions like hybrid and cloud-based, might not suit any given organization's information management policies. Some companies are just not interested or ready to move to cloud yet. Having a fully on-site system brings with it the heavier cost, and mirrors many of the issues in the above section on implementing an entire new solution. Integrating such systems can also be quite expensive depending on the chosen approach.

C. Records Management Integration

This is more difficult to implement in a multi-vendor environment. However it has less impact to the operations of the organization and takes an operational rather than technological approach.

Technical Considerations: A Federated Records Management system will not have controls over content residing in external ECM systems unless Records Management functionality is installed, with tight and deep integrations built.

Most major ECM systems have a SharePoint integration for this purpose, however this can be very extensive and require third party components and a great amount of SharePoint customization. "Out of the Box" (OOTB) is not the "norm" for SharePoint integrations. It can also not fully capture the content that exists due to leaving too much responsibility on users to do optional inputting.

Some federated systems use an integration to migrate content out of the host departmental system - when it meets the criteria to be considered non-operational and a formal record, and into the centralized target Records Management system. This will still have some development impact on the local ECM systems since the functionality may not exist. Users will want to keep the local operational user interface as the main point of access to records after they have been declared a record. Some degree of customization on the local systems will be required to accomplish this. The centralized or Federated Search function will also need to integrate to the Records Management system.

03 - MATCHING NEEDS TO LONG TERM RESULTS

So what do you do? It depends on your situation.

Option 1: Doing Nothing is risky and to be avoided in the long run. Procrastinate at your peril. Option 2 works for highly centralized organizations with few regional or autonomous departments or business units.

Option 2: However, in option 2, if you find yourself facing a "replace the existing ECM with a central and "one-size-fits-all" ECM vendor" scenario, since everything needs re-discovery and re-design, you had better dig in and do your homework. Fixing the existing centralized ECM might just be the best solution, even if it has a negative stigma attached where users and managers are saying "We hate this". Chances are that unless you address the underlying issues they will hate the new one too. Those issues may include poor server performance under high volume, which tends to happen in centralized systems. If so, consider using our MOVE Integration Tool to build and load test content server systems instead the traditional risky cloning or high maintenance scripting methods.

Option 3: Is more challenging but offers the ability to use an Agile approach where you lay in the foundation and then cycle through the various business processes (especially cross departmental ones) doing the most high impact ones first.   It is especially good in scenarios where there are semi-autonomous or regionally disparate systems exist.

The independent but federated systems will, over time, need to be able to justify its own existence from a budget and operational standpoint. It can be posed as a "meritocracy" approach where the winning implementations stay alive and the central system absorbs those that do not, on an incremental basis.

If you do choose option 3, then your organization may benefit from using Qtility MOVE – an integration platform that migrates, synchronizes, and integrates ECM across disparate systems. Such integrations can typically be very time consuming and expensive, however with tools like MOVE, integrations of content management systems becomes much easier by using pre-built enterprise adapters which flow through a central integration engine that can easily be updated without affecting the larger infrastructure.

With MOVE the project scope-creep issues caused by UAT and quality control issues during integration implementations are minimized by using pre-designed and highly configurable application and database adapters what integrate with disparate systems, allowing you to harmonize access controls, security, data structures and compliance across the enterprise.

SOLUTION QTILITY MOVE OFFERS	REMEDY TO CLIENT PAIN
• Migration & integration tool handles messy migration = clients get on with business	• Automation of process reduces time, effort, cost
• Partners can use for difficult migrations integrations	• Enhanced compliance with regulation
• Smaller projects now feasible	• System Synchronizations possible
	• Integration connections can be re-used and re-purposed

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