

# ECM Strategy Components

Thursday, February 15, 2007

<b>Author:</b>	<b>Karuana Gatimu Project Manager &amp; SharePoint Architect Skechers, USA Inc.</b>
<b>Blog:</b>	<a href="http://www.sharepointstrategist.com">www.sharepointstrategist.com</a>
<b>Contact:</b>	<a href="mailto:karuana@sharepointstrategist.com">karuana@sharepointstrategist.com</a>
	<b>310-359-0706</b>
<b>Updated:</b>	<b>January 28, 2009</b>

## 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.

### 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
      - g) Convert unstructured data to structured data stores by implementing a corporate taxonomy & classification system
- b. Corporate Pain Points
- c. Evaluation of Existing Systems
- ★ d. Project Management Methodology
  - i. Utilizing SDLC or MSF to assure successful projects
  - ii. SharePoint projects don't fail because of the technology; they fail because of poor project & communications management
  - ★ iii. Define a communications plan upfront; keep stake holders informed of project vision, implementation goals and timelines.
  - iv. This includes resource plan - who will get the work done.

### 2. Architecture & Integration

- a. Taxonomy - data architecture (web apps & site collections) content types; custom columns
- b. Infrastructure, database, custom content architecture, mashups
- c. Selected integration points with legacy systems
- d. Data conversion options

### 3. Compliance & Governance

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

### 4. Features & Functionality

- a. Selection of features that are needed in your environment
- 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. Records management
    - 1) Crawling existing network shares (yes/no/sometimes?)
    - 2) Classification
    - 3) Batch operation
  - x. Search
    - 1) Taxonomy
    - 2) Business classification systems
- c. More complete list of features/functions at <http://sharepointstrategist.com/2008/06/20/components-of-enterprise-content-management-from-aiim.aspx>

### 5. Fault Tolerance & Data Protection

- ★ **Gain & maintain the trust of the enterprise to reliably safeguard their data**
  - 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
  - d. Iterative development processes
    - i. Prioritize feature roll outs by iteration