

Successful ECM System Implementation is not Magic

By Max Boedder

Enterprise Content Management (ECM) systems, when combined with business intelligence tools, are foundational technologies to support enterprise agility. These platforms will provide employees with both historical insights into business best practices as well as contemporary insights into customers, employees, partners and other business stakeholders. The growing global ECM market is estimated to be worth close to \$60 Billion by 2020. Unfortunately, many companies run into major challenges when implementing their ECM system, such as:

- **Understanding the level of effort that it takes initially to tailor an ECM system to a specific organization such as the development of an enterprise taxonomy, defining managed metadata, and analyzing and categorizing electronic content types as well as their role in relevant business processes.**
- **Identifying and communicating effectively to the end users how the ECM system will improve their daily job duties and obtaining buy-in from end users to use the system as intended.**
- **Providing adequate initial training and ongoing support to ensure the ECM system evolves along with the agile enterprise.**

The underlying causes for all of the above challenges are grounded in leadership, communication, project management and change management deficits. How can these deficits be overcome? Cimphoni relies on a research-based model for successful ECM system implementation, leveraging a specific leadership style and communication process, as well as a self-reinforcing circle of activities that has been proven across different organizations in a variety of different industries.

A Quick Tutorial on ECM Systems

ECM systems are an evolution of knowledge management (KM) systems, designed to capture institutional knowledge, make it searchable and available, and allow it to evolve. This is important because of three factors:

1. **Employee turnover is increasing and company tenure is decreasing, leading to a need to formalize knowledge transfer during the onboarding process**
2. **“Baby Boomers” have started to retire, which compounds the risk that organizational “wisdom” will be lost**
3. **Organizations and the processes, technology and information they use to manage the business are becoming more complex**

In the cases above, knowledge is a critical organizational asset that must be preserved in order to be leveraged. This asset, when effectively captured, can then be used to train the next generation of employees.

ECM systems manage a variety of electronic content or knowledge using various touchpoints across the organization, from email and website content to CRM, ERP and other transactional systems. The objective of implementing an ECM system is to capture, manage, store, preserve and share information efficiently across the organization. It is designed to improve productivity by making information accessible to the right people at the right time, and also to ensure compliance with legal and records retention requirements for the organization.

Because ECM systems can have so many touchpoints across the organization, they often involve cross-functional implementation teams to get their “arms” around and manage scattered and unstructured electronic content. To support this, modern ECM systems include social functionality and a variety of collaboration capabilities.

Leadership Style and Communication

Research has shown that successful ECM system implementations require an ecosystem built on a participative leadership style with a high degree of communication. Participative leadership allows implementation team members and end users to engage in the decision-making process, which creates trust and results in higher commitment and ownership. Leaders need to stay involved throughout the implementation process and must be ready to resolve problems and to remove obstacles. They also need to ensure a high degree of relevant and frequent communication takes place among implementation team members, between implementation team members and end users, as well as to and among the organization’s leadership team to keep everyone informed and engaged at every step of the process.

Self-Reinforcing Circle

There are three sets of activities that every ECM system implementation should apply:

- 1. A Shared Vision of the value of the ECM**
- 2. Project management/Change Management**
- 3. Incremental Delivery**

These sets of activities take place in a particular sequence and enable each other. This circular process is repeated throughout the implementation, improving and self-reinforcing the overall implementation process.



Shared Vision

A shared vision about the value of the new ECM system creates buy in by the leadership team as well as of the end users whose daily work tasks are affected. A shared vision also fosters innovation, as well as the execution of project management and change management, which is helpful when running into challenges and obstacles.

Some organizations build a prototype or a demo version of the ECM system while others may use a series of video clips to communicate the vision and demonstrate the capabilities and value to the organization. Throughout the implementation process, as more and more departments receive value from the system, communicating progress helps to reinforce the vision and enable members of the organization to see the path to beneficial use.

Two Parallel Initiatives: Project Management and Change Management

Standard project management best practices and change management initiatives need to take place in parallel throughout the ECM implementation process. Many organizations follow at least some of the project management guidelines laid out in the Project Management Body of Knowledge (PMBOK). One of the most important, and often overlooked, steps at the closure of each incremental implementation project is to conduct a "lessons learned" session to avoid similar mistakes on future projects.

Research has shown that a fragmented approach to change management has been a major reason for failure of business process reengineering initiatives like an ECM implementation. Quality change management programs win the support of affected people, manage and visualize expectations upfront (see “create a shared vision”), and place proper emphasis and a realistic budget on the training of end users and power users.

Incremental Delivery

Incremental delivery is a hallmark of the agile software development methodology and its benefits are well documented. These benefits include increased transparency and control based on decomposition of projects into smaller, time-fenced deliverables, as well as the frequent feedback and knowledge transfer made possible through successive iterations. The increase of stakeholder feedback also leads to an increase in stakeholder satisfaction.

For ECM system implementations, incremental delivery means starting with limited functionality to avoid overwhelming end users and start with “low-hanging fruit” that delivers early successes. As more successes are realized, goodwill for the ECM project becomes contagious and more people will get on board. This spreads the shared vision, generates buy-in of affected employees and facilitates change management. The series of small successes also ensures that the next project delivery has a higher chance of success. The circle continues to self-reinforce and self-improve throughout these iterations.

You Can Do It

If your organization is considering implementing an ECM system, we encourage you to plan carefully and leverage the Cimphoni model to avoid the pitfalls and challenges that have frustrated many other organizations. The successful implementation of ECM system is not “magic.” But, your organization might consider you a magician if you follow the steps recommended above toward a successful ECM implementation. Good luck!

About Cimphoni

Cimphoni is built on the premise that technology, when properly applied and led, can deliver innovative solutions that transform businesses, enrich the products we use daily and improve the quality of our lives. The Cimphoni team is comprised of technology and business leaders, physicians and medical researchers with a thirst for innovation and a passion for solving problems. Cimphoni Consulting is focused on business transformation using information technology to enable new product and service offerings and improve business performance.

Cimphoni Solutions develops Internet of Things strategy, devices and data analytics, as well as custom enterprise software. Cimphoni Life Sciences creates new medical devices and solutions that address acute and chronic illnesses and improve the health of individuals.

Founded in 2012, Cimphoni is headquartered in suburban Milwaukee and has an office in Phoenix to serve customers throughout the United States. More information can be found at www.cimphoni.com.

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