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ECM Methods

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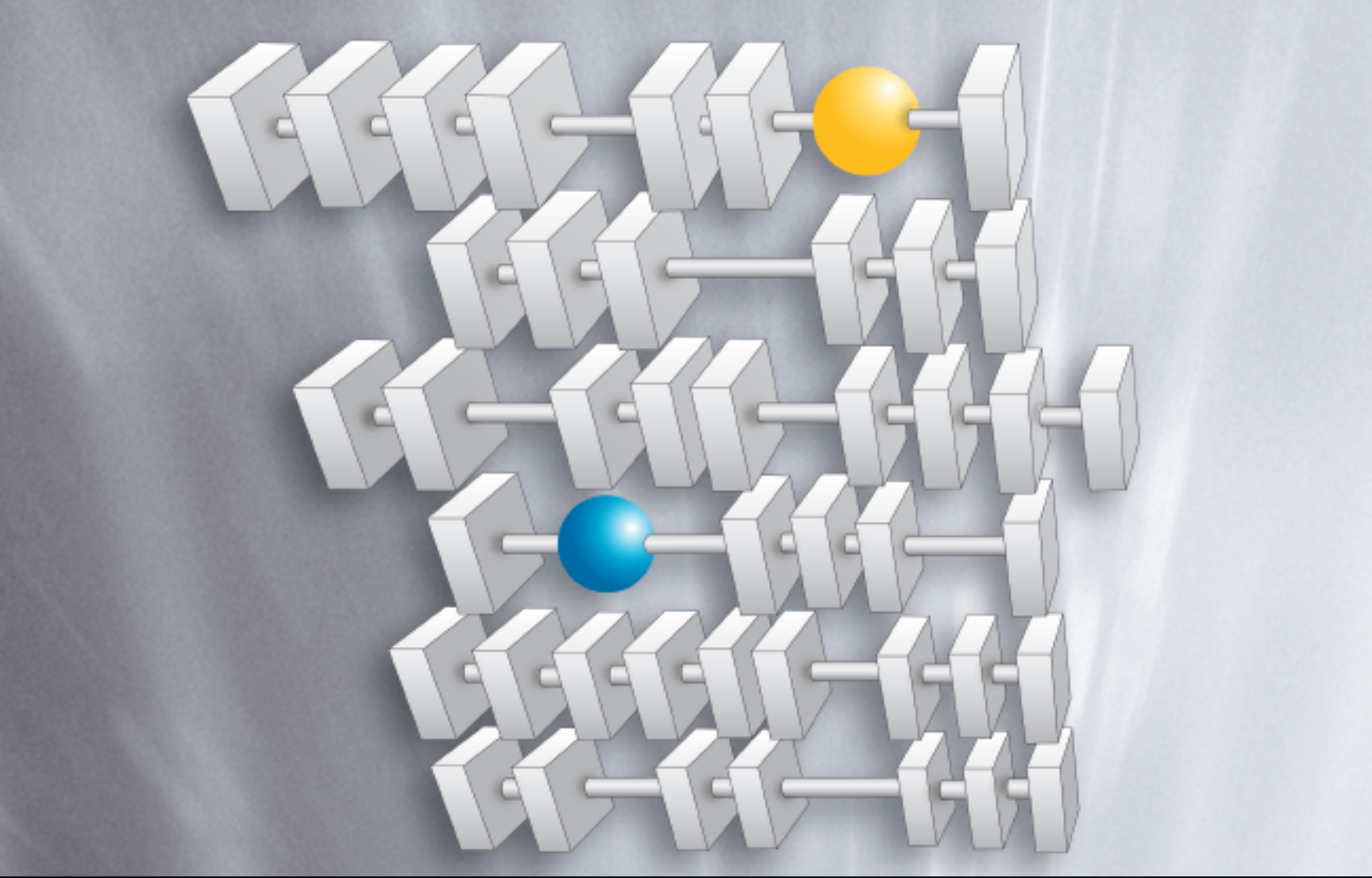

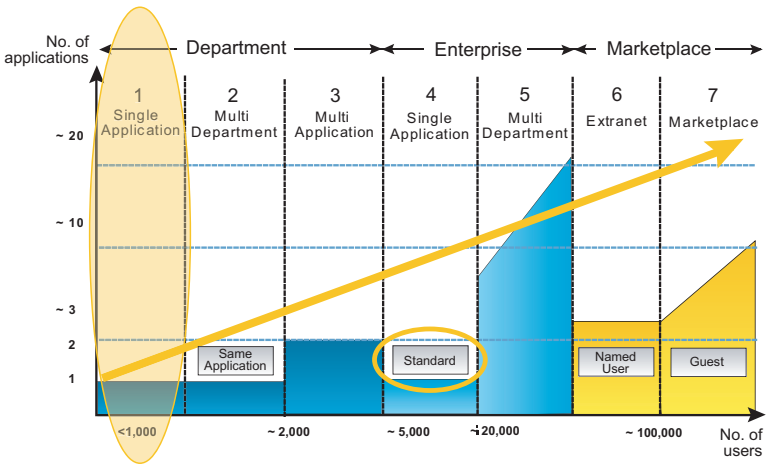

Figure 8.1: Stage 1 of ECM Adoption

ECM deployments usually begin with the adoption of an application that solves a particular departmental problem, shown in Figure 8.1 above.

Typically, the deployment is made to less than 1,000 people, and is sought by a department or operational manager who is the business owner of the problem. A Stage 1 deployment could involve almost any application from the full suite of ECM solutions. A solution may be narrowly targeted—for example, an Accounts Payable department might implement an imaging and workflow ECM solution to better manage its invoice flow processing. Or a solution might be a broad-based initiative—for example, an architecture and strategy group in IT may initiate a collaboration and knowledge sharing platform to support their work in coordinating the technology foundation of the organization.

Both of these are departmental solutions, and both have connections to the rest of the enterprise, yet they are very different ECM implementations serving very different communities. This chapter discusses how to use the deployment framework of Chapter 6 to establish the initial ECM deployment.

CHAPTER 8

DEPARTMENT DEPLOYMENTS STAGE 1

This chapter explores the characteristics of deploying a solution during ECM Stage 1, Adoption. We'll use the Deployment Framework as our blueprint to highlight the deployment steps that must be considered to mitigate risk and increase success for each stage of adoption. Adoption and expansion of ECM within an organization occurs iteratively by building on a series of incremental successes. To proceed to the next stage of adoption, you must make sure you have achieved success in the previous stage.

The Deployment Framework demonstrates the sequencing of tasks and resources involved in each work stream. Although each work stream plays an important part in the long-term success of the ECM program, certain streams take on a higher priority depending on which stage of adoption you are in. As illustrated in Figure 8.2, each work stream in the Deployment Framework has been prioritized as either high (yellow), medium (blue), or low (green) based on Stage 1 adoption. We'll explore this prioritization for each stage of adoption in this and subsequent chapters.

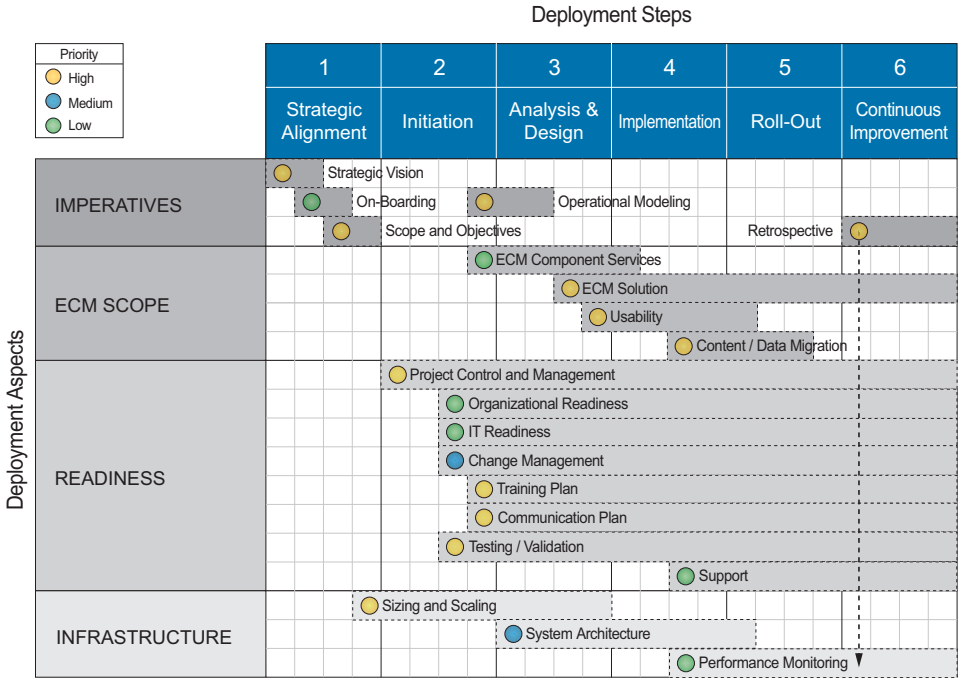

Figure 8.2: Deployment Framework for ECM Adoption Stage 1

Enterprise Application Extensions (EAE)

Enterprise applications such as Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) perform transaction-based processing. However, data residing in these applications is the result of work that has been completed and, in many cases, cannot effectively support other business processes. Many processes, like contract creation, still require collaborative efforts of employees in multiple departments. To maximize content's effectiveness, organizations must connect content to the appropriate business processes and make it accessible to people participating in the process. Enterprise Application Extensions provide the underlying business structure that supports these business processes. Allocating unstructured content to business processes puts the information that people need at their fingertips without having to search across many systems for content.

ECM extends enterprise applications by providing links between key processes and transactional information as illustrated in Figure 8.3. Making this information secure and accessible across a variety of processes helps companies lower costs and the risks associated with meeting data retention and disposal requirements.

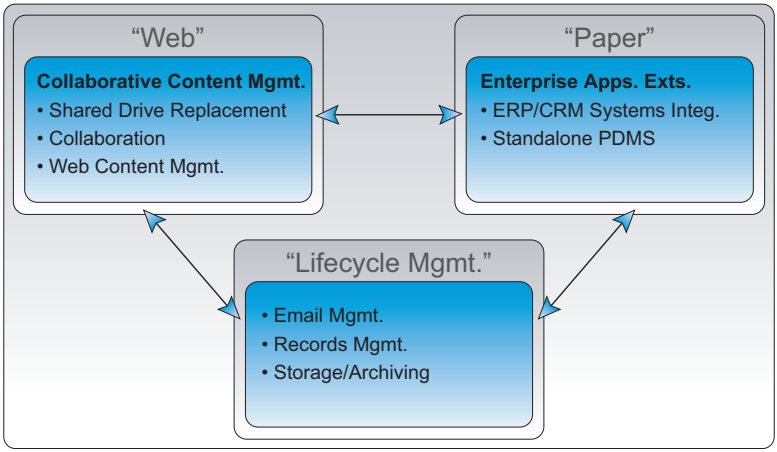

Figure 8.3: ECM Solution Segments

Lifecycle Management

The core of content lifecycle management is records management, the discipline of managing records to meet operational needs, accountability requirements and community expectations. Records management software works by allowing you to attach rules to electronic documents. These rules tell the system when it is okay to delete documents or move them to a data archive, either physically in boxes or electronically on storage devices such as CD-ROMs.

Government offices are superb at record keeping. When we are born, when we are married, when we have children, when we get divorced, and when we die, a record is created at a government office. The rules that determine when those records can be archived and deleted are stipulated in government regulations and policies. Records management systems enforce these policies for government organizations, and for the equivalent form of vital records in an organization.

With daily pressure to comply with regulations and with changes to legislation, managing records and the lifecycle of documents have become crucial components of ECM.

Teams and Collaboration

We have quickly grown accustomed to being able to phone each other anywhere at any time and in a matter of seconds. Cell phones and mobile telephony are so entrenched in our daily lives that it is hard to imagine life before they existed. The Internet has also revolutionized our ability to connect with others. We send documents over the Web and drum our finger impatiently awaiting their delivery. Being able to connect so easily with

our colleagues over the Internet has made it possible to work effectively in virtual teams, with geography no longer a concern.

The Human Genome Project began in 1990 as a collaborative effort by research establishments around the globe to identify the 30,000 genes in human DNA. The project required the collaboration of scientists from many fields, including molecular biologists, engineers, physicists, chemists and mathematicians at the U.S. Department of Energy. Technology had a huge role in the project; the Genome Data Base (GDB) is the worldwide repository for genome mapping data. Researchers around the world used the Internet to share research and answer questions. The project successfully concluded in April, 2003 and would not have been possible before the creation of the World Wide Web.

Global organizations are now able to capitalize on Web-based collaboration facilities to empower their workforces, working as virtual project teams to bring expertise from different areas and office locations to tackle business-critical problems. ECM systems include collaboration tools that enable the best minds within organizations to work together more efficiently—sharing information, capturing and preserving knowledge, managing collaborative processes and projects, and resolving issues.

Stage 1 of the ECM Deployment Framework

First let's confirm the characteristics of a Stage 1 Adoption:

- Single application solving a specific departmental business problem that has been clearly understood and articulated
- Usually less than 1,000 end users involved
- Department manager is the business owner
- Highly homogeneous culture and organizational structures
- The change to the business is primarily operational and tactical versus cultural or a major paradigm shift in the business.

Imperatives

All ECM stages require, at a minimum, a clear understanding of the business drivers that justify the ECM solution being deployed. There is a significant risk that the solution will not be recognized as successful if the business motivation is not defined and agreed upon prior to project initiation.

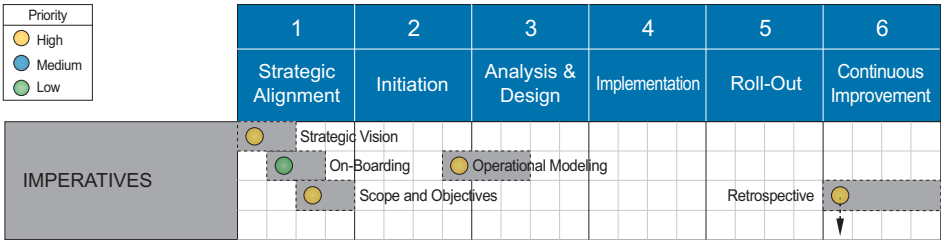

Figure 8.4: ECM Deployment Framework Stage 1 Imperatives

Strategic Vision

The stronger the alignment with the corporate strategic vision, the more likely it is that the ECM solution will be adopted. This isn't always essential to a stage one deployment, where executive management may not be directly engaged. As well, the type of ECM application being deployed makes a difference. The more strategic the sponsoring department, the more important strategic alignment becomes. When ECM solutions are new to the organization and do not have the history to showcase their long-term benefits, being able to show alignment with the organization's strategic, operational, and technology directions will help overcome initial skepticism.

Scope and Objectives

It is a truism in systems implementation that the way to success is to show a "quick win." This is especially true when the implementation is envisaged as the first of many that will follow in the adoption of a new technology. The ideal stage 1 project will have a limited and practical set of goals and clearly identifiable success factors: reductions in processing cost, measurable increase in the use of common architectural elements and documentation, reduction in shared file server space and usage, and so on.

> South East Water

Who: South East Water is one of three retail water companies that provide water and sewerage solutions for Melbourne, Australia. Encompassing a square footage of 3,640 kilometres and with more than 1.3 million customers, South East Water manages infrastructure and assets valued in excess of AUD $1 billion.

Business Needs: An innovative and extensible solution to measure and improve customer service in response to increased service quality regulations.

Business Objective: To implement a single repository for unstructured documents and automate business processes.

Solution Overview: Electronic workflow enables process automation in the Customer Services Division, and a Quality Management System allows all employees to read and update policies, procedures, and work instructions. An electronic repository facilitates management of scanned customer correspondence; plans, drawings and photos; quality procedures; executive and board correspondence; and 650,000 property plans.

Solution Scope: Enterprise wide.

Benefits: Significantly diminished paper usage; document status and audit trail; centralized storage and search; improved collaboration and project management; productivity and efficiency; and enhanced customer services.

Figure 8.5: A Corporate Image Library at South East Water

In response to the introduction of further regulations in the Victorian Water industry, South East Water implemented an ECM solution to measure and improve its customer service in relation to paper-based requests. Although an intranet existed, most of the organization's documents were stored on a shared drive. The system limited document searching to within departments, and documents were duplicated and difficult to access.

South East Water used its project management methodology to identify the business problems, system and business requirements, and potential solutions. Potential ECM projects were prioritized according to their business value, ability to deliver, and the impact on the overall knowledge management strategy. This detailed analysis of potential ideas identified close to 40 projects that were prioritized, scheduled, and resourced.

Taking a staged approach to the implementation, South East Water first integrated scanned customer correspondence in an electronic repository in the Customer Services Division. Phase two involved adding 650,000 property plans to the repository, and subsequent stages included adding a Quality Management System, IT Project management methodology documents, executive and board documents, and a corporate image library. With the introduction of the Quality Management System, all divisions within the organization began to use ECM to read and update policies, procedures, and work instructions.

While there was initially some resistance to the changes introduced by ECM, subsequent internal training and promotion of its benefits has made the system highly popular with staff who continue to embrace and extend the kinds of content to be stored. ECM is now considered a critical system to the business success by both staff and management. A staff survey of ECM has indicated very positive results. The solution end users are mostly staff and internal contractors; however, the Customer Contact e-business solution enables customers to upload plans and submissions that are automatically uploaded into the ECM repository.

The system plays a key role in automating and streamlining the customer correspondence process. Incoming letters and forms are visible and auditable for all customer service staff and management. ECM has been integrated with the Customer Billing System, Customer Contact System, Contract Management System, GIS/Mapping system, Asset Register, and MS Office. 98.5 percent of customer correspondence is now answered within five days—a result that far exceeds the service requirement for a ten-day turn-around. Tracking the status of incoming correspondence has significantly reduced the risk of non-compliance with federal regulations.

South East Water is now recognized as a leader in collaborative document management in Australia's water industry—enhancing the organization's reputation of Excellence, Innovation, and Leadership in Water. South East Water's ECM solution has become a strategic platform for information management, increasing corporate communications and reducing support costs. The company is now embarking on adding a Records Management module and automating further complex paper-based business processes with electronic workflow.

Operational Modeling

Some degree of analysis that uncovers how a business operates on a day-to-day basis is essential to define the implementation. It is particularly important for any stage 1 customer that is introducing a new ECM solution to get the business involved in the early steps of the project. In particular, identifying the roles of the ECM solution users is critical; the number of possible stage 1 applications is so large that there is no standard definition. For example, with invoice processing, roles might include approvers, reviewers, supervisors, workflow managers, and so on. With Architecture Knowledge Management, roles might include authors and content contributors, reviewers, content consumers, and managers, Or the solution may operate as a peer-to-peer flexible collaboration community; it depends on the culture and needs of the organization.

Retrospect

Once the solution has been rolled out, you must monitor to determine whether it is meeting the original business objectives.

ECM Scope

All ECM Stages must select the appropriate ECM component services to address the business solution targeted for deployment. The functionality of an ECM platform is extensive, so conducting the proper analysis and design (Stage 3) to determine the best combination of component services to address the business problem is essential.

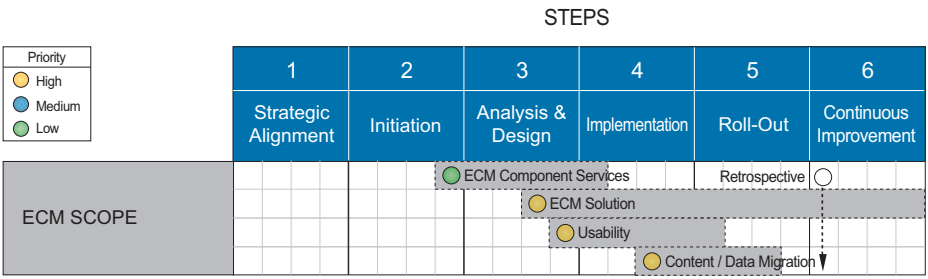

Figure 8.6: ECM Deployment Framework Stage 1 ECM Scope

Other important factors when developing organizing schemes for information collaboration and knowledge retrieval solutions are:

- Plan for growth—a taxonomy that is appropriate for a Stage 1 solution with 1,000 users and 20,000 items in the repository will not be adequate for 10,000 users and 200,000 items.
- The "long-tail" nature of classification schemes—most user retrievals are concentrated on relatively few search terms. This means there is a complex trade-off in the scheme design between the up-front indexing effort and the retrieval time in the search.

Siemens in Johannesburg, South Africa was one of the first groups to address a complex ECM requirement from its business units. To comply with government regulations, Siemens developed Internal Control Sheets to serve as an auditable tracking system for quality care of its internal and external customer bases. Siemens identified specific ECM functionality directory services, caching servers, and Secure Socket Layers (SSL) to satisfy the compliance requirements its Internal Control Sheets were designed to address.

Replacing twenty-six different document management systems, Siemens deployed a single content management and Web publishing application for all of its product documentation, process and procedure material—essentially all critical business documents. Keeping its internal people knowledgeable about the products and about changes in processes and procedures in the organization, this solution for finding and disseminating key documentation is a critical part of Siemens' Web-based efforts for ongoing collaborative communication with partners and customers.

An application call EZA—an acronym for easy access—provides access to contracts and customer engagement information for solutions and services. EZA pulls together all Siemens activities for a single engagement with a customer, from the time a prospect becomes a lead, through installation and final confirmation of the arrangement. A unique approach to sales and customer engagements, the solution aids the sales force in their ability to interact with people internally, customers and business partners.

ECM Solution

Once the appropriate combination of component services has been selected to address a business problem, it becomes an ECM solution. For Stage 1 solutions this is usually straightforward, as many ECM components are designed or packaged to be aligned with specific solution applications. Some solutions might require a single primary service such as Document Management, Workflow, or Web Content Management. Others, often in a specific industry or business unit, might use a standard package, for example a regulated document solution for Life Sciences.

During Stage 1 adoption, this solution establishes a standard which requires documenting configuration details, procedures, guidelines, and organizational structures.

Usability

A solution can succeed or fail based on how the end user interfaces with the application. The greater the transparency of the application into the user's daily tasks, the more likely it is that users will embrace it and the solution will succeed. Key elements of usability to consider for Stage 1 are:

- Can the solution be delivered through the user's standard desktop tools? This is important when the solution impacts intensively used tools, for example email mailbox archiving.
- If a new interface is needed because the solution introduces a new job function, can it be made simple and consistent? An example here might be a Discovery Search interface for email. The objective is to improve the legal department's ability to search, determine relevant responses, package them, and deliver them to counsel with the minimum intervention of IT. A simple but powerful search tool with the ability to select results and then perform actions such as holds or downloads should be provided.

Data Migration

A thorough analysis of the data that is to be managed within an ECM repository must be done to properly control, organize, access, and consume the information. Developing an appropriate data model from scratch is a considerable undertaking, and for most Stage 1 solutions, should not be necessary, especially if they are aimed at common business processes such as invoice management. The models can be significantly more complex and time consuming to develop for compliance solutions, especially if records management and retention strategies are needed. In such situations, even a Stage 1 departmental deployment may require an enterprise view, which can increase the cost and time to define the deployment strategy considerably.

Readiness

Readiness may be the most important and overlooked of the four aspects of deployment. It broadly covers the work streams that manage, control, organize, and sustain the ECM program. We assume that good project management methodologies will be used regardless of which ECM adoption stage you are in. In this section, only those aspects of readiness that are particularly relevant to Stage 1 applications will be discussed; other elements of readiness are covered in later chapters.

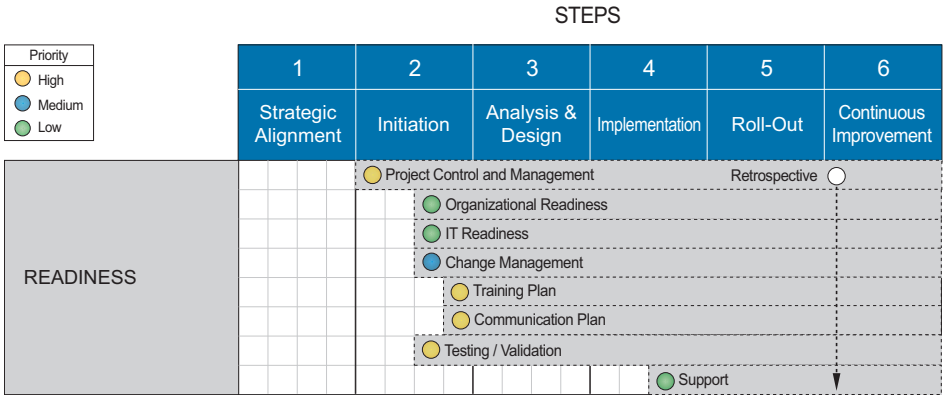

Figure 8.7: ECM Deployment Stage 1 – Readiness

The degree of effort that will be put into Readiness depends on the nature of the ECM Solution and whether it is expected to continue as a departmental solution or be the starting point for extended adoption throughout the enterprise. Adding ECM support to a departmental ERP application such as invoice processing is not much different from any other IT project and requires little special treatment beyond good project management and user training.

Organizational Readiness

All Stage 1 applications require, at minimum, the definition of roles and responsibilities necessary to manage and evolve the solution. Defining these will help set the standards as the application migrates from one department to multiple departments. This is especially important when deploying compliance-centric applications. Content and collaboration applications may also require models to be developed of the social networks that are operational in the organization. Figure 8.9, for example, shows email flows among a large project team (Valdis Krebs, 2003, http://www.orgnet.com/email.html).

> Transport Research Laboratory

Who: A globally recognized centre of excellence, TRL (Transport Research Laboratory) provides world-class research, advice, and solutions for all issues relating to land transport. The center employs 550 staff, including 400 scientists, and its work provides innovative solutions for a range of clients from the public and private sectors.

Business Objective: To implement and maintain an information strategy that would incorporate a long-term IT plan, and to employ an information architecture with tools and processes that would allow knowledge, information, and data to be managed efficiently and fully utilized.

Business Needs: Diminish heavy reliance on paper-based processes, reduce physical storage space required, retain capitalized knowledge, and enhance information access.

Solution Overview: Implementation of an electronic document management and retrieval system (EDRMS) enabled electronic document scanning, filing, and retrieval, and facilitated the conversion of paper-files to electronic format.

Benefits: Improved and more effective document access; improved cross-divisional co-operation, which produced better work results and increased productivity; greater consistency in customer-facing and corporate activities; increased accuracy in business decision making; and improved document and records tracking with full audit trails.

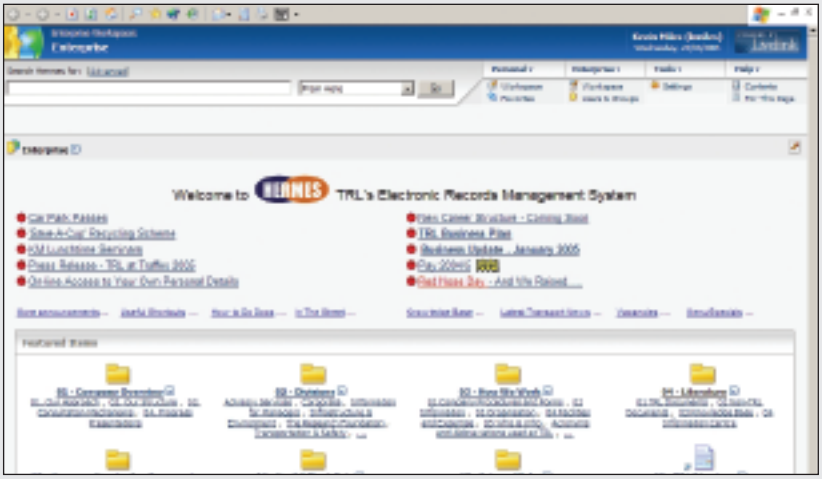

Figure 8.8: Welcome Page of the EDRMS at TRL

An office premises move required TRL to re-examine its document and information management practices. Insufficient physical space in the new building prevented the organization from continuing its paper-based business processes and localized document storage lacked structure.

The decision to implement an Electronic Document Records Management System (EDRMS) had created a daunting challenge. Paper records and artifacts were stored in just about any available space at TRL—offices, stairwells, corridors, laboratories. A survey revealed shelf space of 10 kilometers of physical records, but only four percent of them were managed in registered files. More than 90 percent of data, project files, and documents were locally stored and backed up by users individually. All this data had to be sorted before the move into the new building, ensuring that business-critical documents were retained while unwanted files were weeded out—all without interrupting normal business activities or the move schedule.

All staff participated in 'Records Management Weeks'. More than 125 tons of paper and 15 tons of confidential material were shredded and recycled. Over 500 filing cabinets were emptied and recycled, 109 garbage bins removed and 8,300 books donated out. The clean-up stage was followed by a phase of restructuring and scanning the remaining 300,000 documents into a file plan that was seamlessly migrated to ECM. The complete migration took place over three consecutive weekends, and throughout the migration, existing access permissions were fully maintained.

Prior to the move, TRL believed it possessed approximately 3,000 formal scientific reports and a similar number of confidential client reports, but most staff only had access to documents they had created themselves or to those written by immediate predecessors. However, the records clearance program identified more than 8,000 scientific and over 7,500 client reports. As part of the 'Moving Ahead Project' these reports have been scanned to PDF files, indexed, and made text-searchable within the ECM system, ensuring that researchers can find the most relevant information.

The growing use of structured procedures using templates and workflows is resulting in a more uniform approach to business management at TRL. Project decisions reflect greater and more effective access to supporting documentation, while decision record keeping is supported by full audit trails. Before the transformation, only four percent of documents were in registered files, as opposed to today, when all project documents are kept in their ECM project folders.

The 'Moving Ahead Project' fundamentally changed the information culture at TRL. Within just four months, TRL had transformed its information environment by converting paper records collected over 40 years to electronic files. The completed project told a story of information management in its most comprehensive form—from preparing the organization and documents for the EDRMS to managing the cultural transformation as staff moved to an open information environment.

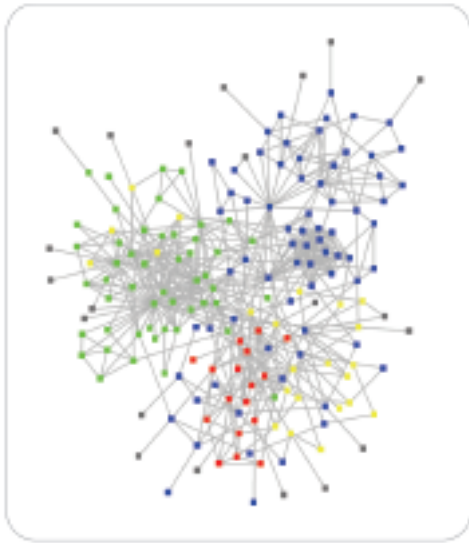

Figure 8.9: Data Mining Email to Discover Social Networks and Emergent Communities

IT Readiness

It is important to set the precedent by codifying your guidelines and procedures from a technical perspective. Most IT organizations can leverage existing procedures like backup and maintenance, continuity planning, and disaster recovery. Establishing these procedures early in the ECM Adoption lifecycle will better prepare the organization for the growth of ECM program.

Testing / Validation

All applications must go through rigorous testing and validation protocols before they can go into production. While extensive testing of solution functionality and performance is essential, the nature of the test procedures will depend on the type of ECM Solution being deployed.

Enterprise Application Extension (EAE) – Enterprise Application Extension (EAE) solutions can be tested with simulated or real datasets derived from the core operational and transactional applications that the ECM Solution will support. These solutions generally involve standardized business processes and workflows, providing a convenient and appropriate framework for structuring the testing.

Records Management and Email (RME) – Records Management and Email (RME) solutions must be tested for compliance with regulatory mandates and industry standards. This provides an external objective basis from which to develop the test procedures and plan.

Collaboration and Content Management (CCM) – Collaboration and Content Management (CCM) solutions are, in general, the most difficult and complex in terms of developing validation tests. The adaptive content management approaches required to support flexible collaboration applications mean that each user's approach to the ECM solution may be very different. Test procedures and plans should be role based and cover the interaction effects of collaboration as well as the basic information addition and retrieval functionality.

Change Management

During Stage 1 adoption, most of the focus of change management is on Training and Communication Planning. A good choice for a Stage 1 application deployment is one for which the department and culture are generally homogeneous and no major paradigm shift in the organization is sought. This will decrease resistance to change and deployment risk significantly.

Training Plan – As a subset of Change Management, developing a good training plan will become essential for end-user adoption. The complexity of the application will determine the level of effort required in training your end users. In many instances, the new solution is replacing a process that was done manually or on old technology. It is often necessary to look at incentives and rewards program to encourage people to adopt the new system.

Communication Plan – Along with training, a good communication plan will go a long way in convincing the end users of why the new business solution is necessary. Their question is always, "What's in it for me?" The plan should leverage the strategy and visioning developed during the Imperatives phase in communicating the reasons why the department is implementing the new system.

Support

It is vitally important to have a support infrastructure in place to answer questions and investigate and resolve issues that arise during the use of the application. The type and depth of support, and how it is delivered, depends on the class of ECM solution being deployed. For EAE solutions, such as the Accounts Payable example, support should be delivered through the same channels used for the underlying operational application.

Similarly, first-line support for email solutions should come through the existing enterprise support infrastructure, although specialized second-tier support must be readily available for records management and compliance issues.

ECM solutions will likely need new support services and approaches. Especially when the collaboration solution involves changing working patterns, it is essential that users do not feel that they are being left "out there" to figure it out for themselves. The most important attribute of support for a collaboration initiative is speed of response. It is essential to get the user back into the collaborative environment as quickly as possible so that the new working habit is reinforced. This approach is also one of the most effective tools in word-of-mouth marketing of the new solution.

Infrastructure

All ECM Stages require a hardware and software platform that will support the ECM application. Developing an infrastructure plan is a standard function of IT capacity planning units. However, ECM solutions can pose particular problems depending on the technology and application being deployed.

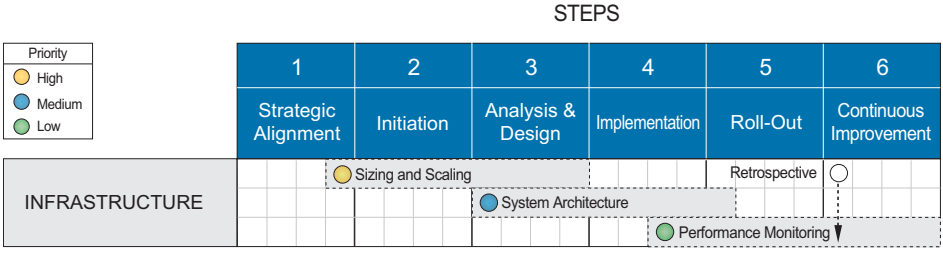

Figure 8.10: ECM Deployment Stage 1 – Infrastructure

Characteristics of ECM Solutions that affect the design of the IT infrastructure include the following:

Document Object Size

ECM, which focuses on words, pictures, and sound, inevitably deals with much larger document and file sizes than ERP applications. This impacts both storage and network bandwidth requirements. It is especially important to handle these loads efficiently in

ECM solutions that support existing ERP applications. Introducing delays or latency through the ECM solution can have unpredictable and often adverse effects on the performance of the established ERP application.

Indexing and Search

Introducing large-scale ECM Search into a working environment (especially for a solution such as email) may require careful planning of the index design to ensure efficient backup and recovery, and to minimize the impact of a rebuild should the index become corrupted. Modern search engines require specialized design and deployment to make the best use of the hardware and infrastructure investment.

Workload Patterns

Most collaborative and content management solutions show very wide variations in activity during the working day. Peak activity exceeding ten times the average is common in these environments and users are intolerant of response slowdowns.

ECM Vendors have developed considerable experience with these and other infrastructure issues and have extensive packages of monitoring, analysis, and modeling tools to support the design process.

Follow-On Steps

The main reason to monitor the solution after deployment is to confirm and demonstrate that the original business objectives of the project have been met. Examples of metrics for this measurement were identified earlier in the Imperatives work stream description. Once this is established, monitoring should focus on metrics that will help characterize the ECM Solution as one that is suited for further deployment and which can help build the business case to support the future stages of adoption. Solution performance, cost of operation, user satisfaction, and so on are all metrics that add value.

The solutions that are most likely to need fine tuning after deployment are those in the collaboration and content management group. This is partly because the initial success criteria for these classes of application tend to be softer and less well defined. Another reason is the adaptive nature of the applications—they often evolve in unexpected ways, and the stable use configuration and working patterns may be very different from those initially envisaged. Good tracking and documentation of this adaptive change process not only improves planning for Stage 2 adoption and beyond, but also supports the business case by showing how the ECM solution is impacting the organization.

> Unilever

Who: Unilever is one of the largest international manufacturers of leading brands in foods, home care and personal care—brands that are known and trusted by millions of consumers around the world. Best known for carrying brands such as Knorr, Becel, and Conimex, Unilever Bestfoods Netherlands (UBF NL) is organized into business units, sourcing units and a number of corporate departments.

Business Objective: To promote internal branding values and to align the daily business processes of Unilever's units and departments.

Business Needs: An unfriendly user interface of the corporate intranet needed to be redesigned in order to increase usage and expand communications methods.

Solution Overview: A single digital platform has been implemented across the enterprise for general document and knowledge management. Internal usage and system adoption have been facilitated though a custom-made look and feel for the corporate intranet including an improved user interface, news channels for individual departments and dynamic content publishing.

Solution Scope: Enterprise wide.

Benefits: Creation of a standard, consistent intranet look with improved functionality has increased usage and enhanced internal communication, while enabling successful internal branding values promotion and increased usage of standard ECM functionalities.

Figure 8.11: Recipe Management at Unilever

In order to align the daily business processes of its units with IT, Unilever Bestfoods (UBF) NL decided to implement a single digital platform across the organization. The solution was supposed to enhance internal communications and promote branding values to all employees—but this could only be achieved if all employees actually adopted and used the system. As a result, once ECM was identified as the sole platform for all digital content, three parallel developments were required to address the following issues: simplification of the user interface specifics; an intranet-based display of new branding identities and their communication to all employees; and a variety of options for corporate communication, including both formal and informal messaging methods.

With the help of external consultants and the solution provider, Unilever Bestfoods developed a tailored user interface for the ECM system. By assigning specific request parameters, XML data is dynamically exported from within an ECM application and applied to a specified XSL style sheet to create an HTML page—the 'skin'. ECM modules were specifically developed to provide user-maintainable skin control and some extended XML export to support the custom XSL style sheets, software and documentation. This solution enables UBF to publish ECM content, including documents, news items and discussions, in a Web site-like interface that fully reflects the organization's internal branding efforts.

The developed UBF news pages were automatically launched by every employee's Web browser, bringing together the functionality of the ECM enterprise workspace and the power of the news channels. Every department in UBF NL maintains a unique news channel supported by a designated news channel manager. The news page displays all corporate news and select articles, improving the visibility of activities across the enterprise. An intranet home page serves as a template for all UBF departments—every business area can set up a localized information structure that completely addresses the distinctive needs of each department. Each home page displays hyperlinks to categorized content stored in the ECM.

UBF's tailored solution leverages the functionality and XML architecture features of ECM to apply a familiar and consistent user interface across the organization and support a standard corporate look and feel, which enables internal promotion of branding values across the enterprise. The ECM implementation includes key applications for brand/image management, recipe management, recipe marketing and a news-feed. These key applications are designed to generate user-awareness and draw increased traffic to the intranet—a 'pull' strategy that has been instrumental in encouraging users to utilize the ECM system for document and knowledge management.

Future maintenance of the site pages can be fully administered by UBF, eliminating costly and time-consuming necessity of further development. This level of internal control will enable UBF to continually update and tailor content based on current needs.

Stage 1 Summary

The essential step in ensuring a successful Stage 1 Adoption is to be clear about the type of ECM Solution that is being deployed, whether Enterprise Application Extension, Records Management and Email, or Collaboration and Content Management. Once this is determined, the design approach, success metrics, user support, and training strategy are easily defined.

- Stage 1 Adoption will quickly enter Stages 2 and 3 when the application is perceived as a tangible and measurable success by executive management, and when those in the department recognize its benefits and communicate the results to others within the organization.

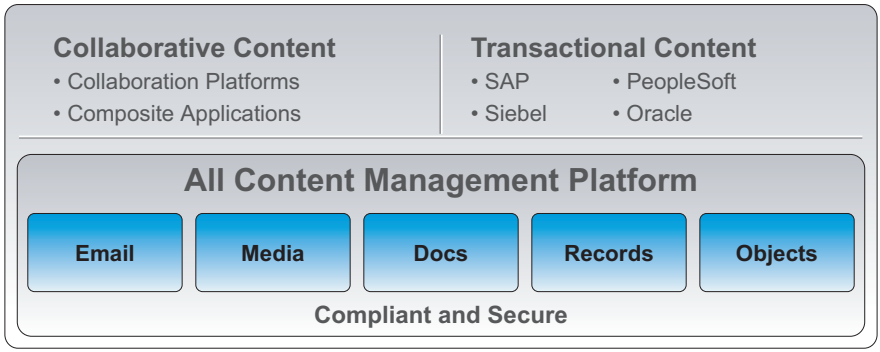

Figure 8.12: ECM Solution Structures

As the future deployments from Stage 2 through Stage 7 occur, the initial ECM solutions, implemented for just one of the ECM Types we discussed, will develop into a more sophisticated architecture in which an Enterprise Content Management platform provides integrated content lifecycle management services to the collaborative content, and enterprise applications are used to manage the business. As this occurs, the ECM Solution Segmentation shown in Figure 8.2 at the beginning of this chapter matures into the ECM Solution Structure shown in Figure 8.12.