

# ECM, Defined By AIIM

Enterprise Content Management (ECM) is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM tools and strategies allow the management of an organization's unstructured information, wherever that information exists.

## Content at Work

It's not enough to "manage" content. Of course, the ability to access the correct version of a document or record is important, but companies must go further. Content must be managed so that it is used to achieve business goals. Central to this strategy are the tools and technologies of ECM, which manage the complete lifecycle of content, birth to death. To drive understanding of these tools, this poster highlights a typical process for a piece of content as well as four primary areas in which content, and ECM, is fundamental to the success of your company: Compliance, Collaboration, Continuity, and Cost.

While there are ECM technologies, more importantly, ECM is an ongoing and evolving strategy for maximizing how your content is to be used. Use the information below as a starting point to review a common content lifecycle. Map a current process to see where you may find overlap and room for improvement for the applications and strategies that your business is developing. The information below only hints at the complexity inherent in any process that deals with managing an organization's content. As always, you must match up the technology tools to address YOUR businesses needs. Technology can enable streamlined management of content, but the underlying strategy must come first.

## Compliance

The key to a successful compliance strategy is integrating the idea of compliance success into your business-not viewing compliance as a project that can be completed and then considered "finished." While painful, complying with regulations should be viewed as an opportunity to improve common business processes and not just an ongoing cost to the business. It is no secret that there can be high costs associated with your compliance initiatives for both technology and employees. Only securing compliance for one regulation such as Sarbanes-Oxley or HIPAA will cause your costs to continue to grow as each new regulation is delivered over the years. To help limit the risk and cost, proactive ECM strategies must be developed within key areas, such as records management and business process management. Ensuring that the proper business practices are followed and that content is properly captured, stored, managed, and disposed of at the appropriate and legal time in its lifecycle. Developing a compliance initiative properly will tap many areas of expertise, particularly legal, IT, and records management; all in support of the overall business objectives of the organization. Individuals from each of these areas must contribute their knowledge and perspectives to ensure the benefits of a sound compliance program. While compliance is not always a technology problem, information technology, and the massive growth of unstructured content, contributes to corporate exposure. The tools of ECM, properly used, can help reduce the overall cost of compliance to the business.

## Collaboration

Collaboration is the art of working together. The key to strong collaboration is utilizing the set of technologies-instant messaging, whiteboards, online meetings, email, etc.-that allow work to take place wherever and whenever needed. It's good business; groups can accomplish more than individuals. Collaboration allows individuals with complementary, or overlapping, areas of expertise to create better results faster than before. With today's collaborative tools, business units and teams can work together anytime-whether in adjoining offices or a world apart. The technology can now address operational objectives like saving time, streamlining processes, cutting costs, and



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# ECM

is also known as:

Enterprise Content Management,  
Content Management,  
Document Management,  
and Paperless.



## ECM Covers The Four C's

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improving time to market. With the many different types of collaborative tools available, companies must be sure they select the correct tool for their business need. Functionality can be broadly grouped into (1) communication channel facilitation, which enables short-lived interaction such as chat, instant messaging, white boarding, etc.; (2) content lifecycle management, which manages content objects involved in a business process; and (3) project facilitation, which organizes and simplifies the way that people work toward a common goal. However, there is a catch with collaboration. When using collaborative tools, you must be aware of records management, knowledge capture, and compliance requirements. For some industries, all customer communications must be kept. And, for a collaborative product design process, companies must be sure that the results are kept as business records.

### Cost

While ECM can be a costly initiative, what are the costs of not properly managing your content? The cost of not implementing ECM tools is too often left unmeasured until too late. Things like the cost of long legal proceedings, the loss of repeat business through the inability to perform simple customer service interactions, and the cost of typical business process delays are easy to measure after the fact-lawyers' time, the cost to acquire new customers, and FTE salaries. Understanding the cost of these potential losses will allow you to see that ECM investments have valuable benefits that often can be measured, but not always. The key is to set your key metrics for success up front and measure your success based on those expectations. Measuring the revenue based on improved information in the call center can be done as well as measuring the cost benefits of improvements in process speed for a loan application, claim process, or FDA drug approval (to name a few). The improvements will not always show on the final balance sheet but they are out there. While identifying a direct ROI can be difficult, it is not impossible to see the impacts of the improved process efficiency on the business. ECM tools can make your organization more efficient and drive down the cost of doing business. These technologies provide value to your organization by more efficiently organizing information for its subsequent retrieval, use, and, ultimately, disposition. Plus, as these tools are used by more organizations, it becomes part of how you work. What's the ROI on a telephone? Yet, you wouldn't think of doing business without one, would you?

### Continuity

Keeping a business going 24x7 is the task of business continuity planning. While often mentioned with disaster recovery, business continuity planning is the overall strategy for ensuring that operations continue in the event of any disruption-natural or man-made. Disaster recovery is more narrowly focused on getting an organization's IT infrastructure going again, a subset of business continuity. Because the lifeblood of most businesses today is represented by electronic documents, ECM has a key role to play in continuity. After all, without access to the most vital electronic documents, a business is dead in the water. ECM technologies allow the creation of centralized repositories where all vital corporate information can reside. The method of storage will vary depending on how critical the content is to the company-from off-site back up tapes to redundant, mirrored sites separated by geography and on different power grids. A strong continuity plan will show you that not all content is critical. Companies must prioritize their content to determine how quickly content needs to be back online in the event of a disaster. Business continuity begins with a sound plan and high-level executive support. Next, mission-critical processes and the entities on which they are dependent must be determined, followed by a business impact assessment to determine the impact of a disruption, or losing, those processes. Defining what a business considers a disaster and explaining how key processes will be recovered are the next steps in the plan. A crisis operations center should also be established with procedures for chain of command and other roles. Finally, don't forget to update and test the plan annually or as business needs change. Effectively delivering on a continuity plan will enhance your ability not only to recover during a system failure but will enable you to better define the priority of your business content and improve your overall ECM strategy.

AIIM is the global ECM community that provides education, research, and best practices to help organizations find, control, and optimize information.