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Enterprise Content Management & Content Management Solutions

ECM—From Components, to Silos to Solution Platform

Enterprise Content Management (ECM) systems have been a part of the business solutions and IT toolbox for several decades. ECM began with the implementation of component technologies. ECM was not conceived holistically, but rather grew from the integration of point technologies that include search, imaging, electronic records management, document management, COLD/ERM, web content management, workflow, collaboration and hierarchical storage management. These point technologies were typically targeted at specific collections of unstructured content (e.g. documents) to solve targeted business issues.

With usage of these customized systems, built through the integration of the component technologies, came a realization and demand for integrated solutions. Technology providers responded through market consolidation. Component technology was acquired and merged into platforms, systems that seamlessly provide access to some mix of the component technologies. Around the year 2000, the term ECM emerged, as a way to refer to these component technologies available in a single product suite.

Despite this however, the reality of ECM in many organizations is still fragmented. There is a potential for ECM, as an integrated set of functionality, to be implemented in silos. ECM platforms continue to predominately target individual collections of content, lacking true enterprise-wide reach. Users have come to realize that managing unstructured content in and of itself is only half the issue. ECM needs to be integrated into business processes that require a combination of both structured data and unstructured information such as Word files, scanned images, spreadsheets, presentations, correspondence, reports, and e-mail. Too many organizations fail to embed ECM and the unstructured information it manages into the business process, which leads to a host of issues, including bad decision making, delays in process, higher costs and lack of compliance. This has led to a realization and demand for more integrated content management solutions that effectively incorpo-

rate unstructured content into business processes so that employees can make faster and better decisions, share information across functions, ensure consistent communications and more. When built on an ECM platform, these content-enabled solutions leverage the ECM functionality across the organization by embedding it into business applications and processes, providing a more seamless interface not just to the ECM functionality but enterprise content as well.

Additionally, these solutions can be easier to deploy because they typically include pre-built integration to complementary ECM products, include partner technologies, industry and business process expertise and are complemented by an array of professional services.

Recently, AIIM was commissioned by EMC to assess the ECM market. This paper provides a snapshot of the market's perception of and experience with ECM. It is predominately based on a survey completed by 212 IT professionals from large organizations. (See the Appendix for more detail on the survey.) In this paper, we examine the current awareness level concerning the importance of unstructured content, business risks associated with poorly executed ECM, and the approaches users prefer to deploying ECM.

Assessing the Scope and Criticality of Enterprise Content Within Business Processes

The need for content management solutions is directly related to the pervasive nature and importance of enterprise content itself. When asked the degree to which unstructured business content (e.g. documents, images PDF, scanned paper documents, rich media) is used within their organization, virtually all, 99% of respondents indicated that unstructured content is used in at least some **core** business processes. Perhaps even more important is the fact that 43% of the respondents indicated that this content is used in more than half of their organizations' **core** business processes. Unstructured content is not relegated to a few specialized business processes, but mainstream and pervasive. This implies that careful and strategic management of the content is critical to the organization.

In fact, when asked to identify the risks that stem from lack of access and lack of integration of unstructured content to core processes, survey respondents were very clear and strong in their opinions. An overwhelming majority (64% and 59% respectively) indicated that inconsistency in communication between functional areas and duplication of efforts/"re-invention" are risks. It should be appreciated that each of these potential risks

can occur even in cases where ECM technology is used, but in application and functional silos, or in cases where the managed content is not integrated into the business process. Without truly integrated content management solutions, these risks can still occur. The potential costs associated with each of these risks are situational, but it is reasonable to assume that in many cases the costs can be quite high. For example, inconsistent communication to customers can lead to law suits and breaches of compliance. Similarly, re-invention can represent a tremendous loss of time and profit in industries such as pharmaceuticals, in which R&D and product development are significant costs of business.

In fact, many of the other risks identified by survey respondents can be viewed as outcomes to these two top ranked risks. It is important to appreciate that none of the risks that were identified by survey respondents can be taken lightly.

The management of enterprise unstructured content is critical because this content is integral to many core business processes, and as such, mismanagement of the content can lead to real and costly business risks. It behooves every organization to assess the degree to which their approach to ECM adds to or lessens their risk levels associated with poor access to unstructured content.

Figure 1. What percentage of your CORE business processes do you believe use unstructured content (documents, images PDF, scanned paper documents, rich media) on a regular basis?

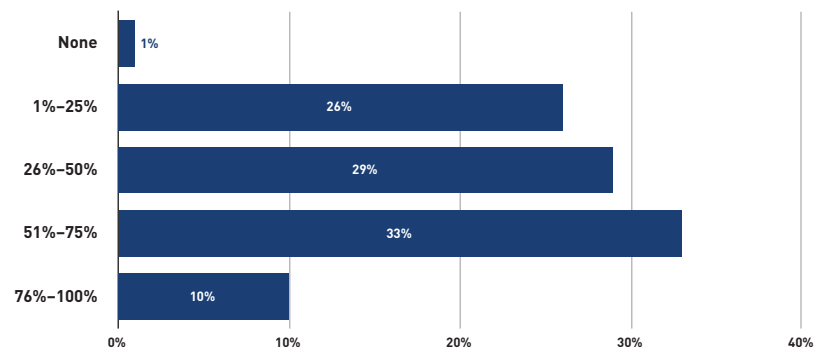
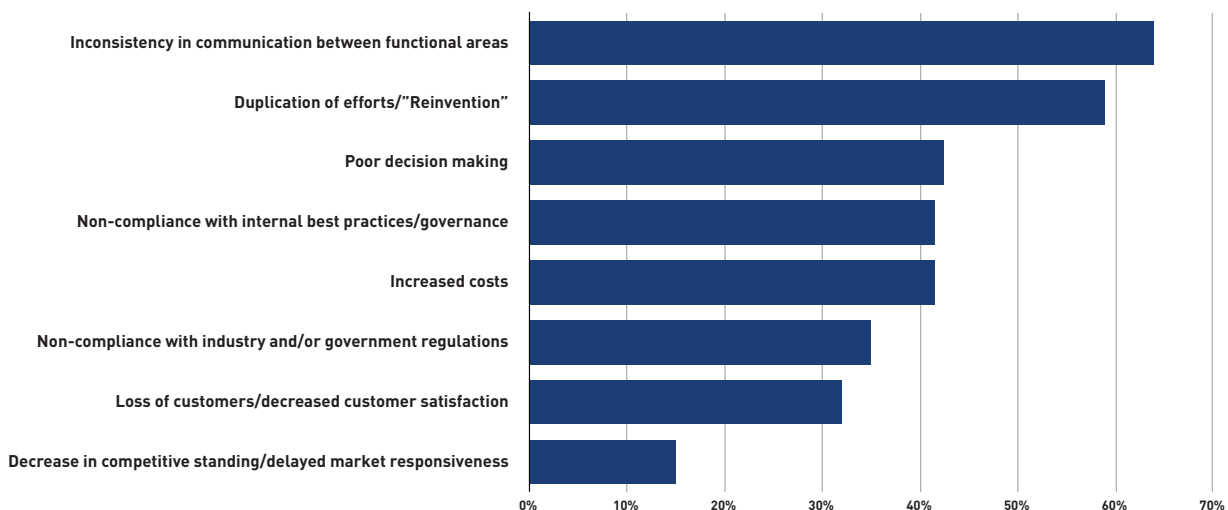


Figure 2. In Your Opinion Which of the Following are Likely Risks to Not Having Simple Access to Unstructured Content?



Content Management Solution Deployments Take Too Long, Today

The survey demonstrates that ECM deployments take longer than organizations would like. As introduced earlier, ECM has evolved over time and as such is associated with implementations that require not only customization but integration. The advent of ECM platforms that provide integrated content management technologies out-of-the-box has dramatically lessened the need for customized integration. Yet nearly half, 47% of survey respondents still feel that ECM solutions require more effort than is reasonable or justifiable. Real world ECM implementations are still associated with high and costly degrees of integration despite the increased quality and availability of pre-integration of ECM components. As

introduced earlier, unstructured content is a key element of many core business processes. As such, ECM functionality is required to be integrated into multiple applications, content/data repositories and legacy systems. In fact, when asked “What accounts for delays in developing business solutions on top of an ECM platform in your organization?”, such integration issues were the top three indicated by survey respondents: “need to integrate various technology components into the solution”, 37%; “legacy integration”, 34%; and need to link proprietary data/content repositories, 33%. All other issue types ranked well below these integration challenges, including the often complex process analysis and system design. In total, the survey shows that organizations need to streamline ECM solution deployment.

Figure 3. Does the Development of ECM Solutions In Your Organization Require More Effort or Less Effort Than You Believe is Reasonable/Justifiable?

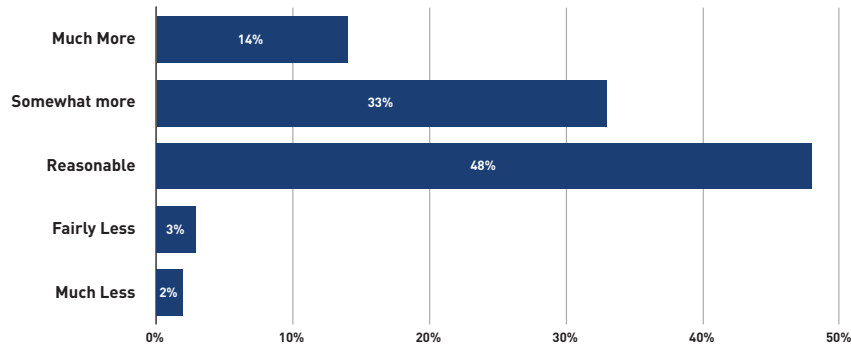
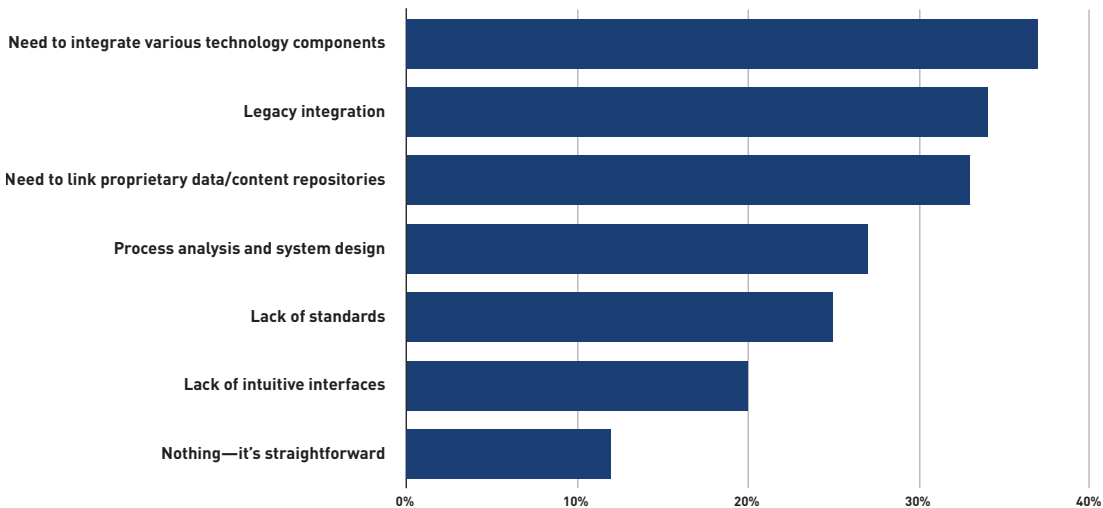


Figure 4. What Accounts for Delays in Developing Business Solutions on Top of ECM Platforms in Your Organization?



Companies Seek Platform-based Solutions

These realities result in an evolving market demand for ECM functionality integrated into content management solutions, built on top of reusable ECM platforms. ECM systems are more prevalent today than a decade ago. With this market maturity has come a realization that effective management of enterprise content transcends the need to deploy component technologies in silos of targeted application. Enterprise content needs to be effectively shared across core business applications and among multiple users. While providing some real benefit, siloed solutions that address a single application and/or group of users are no longer adequate. Organizations now target ECM platforms on which they can build solutions and deploy content management solutions. This positions ECM as an enterprise competency (built on a set of technologies) that can support any and all user communities and content repositories and be integrated into business processes.

When asked what the most important elements to an ECM solution were within their organization, survey respondents pointed to a variety of issues. It is not surprising, however, based on the observations already discussed, that issues related to integration and leveraging ECM functionality across the enterprise were paramount. In fact, “seamless integration between data, content and applications” ranked slightly higher than “ease of application development and deployment.” While ease of implementation is an issue—one directly reflective of the attitudes expressed in Figure 3 above, the related issue of integration requirements is viewed as a superset and more pressing issue. If ECM solutions provided a greater degree of integration then ease of implementation should follow.

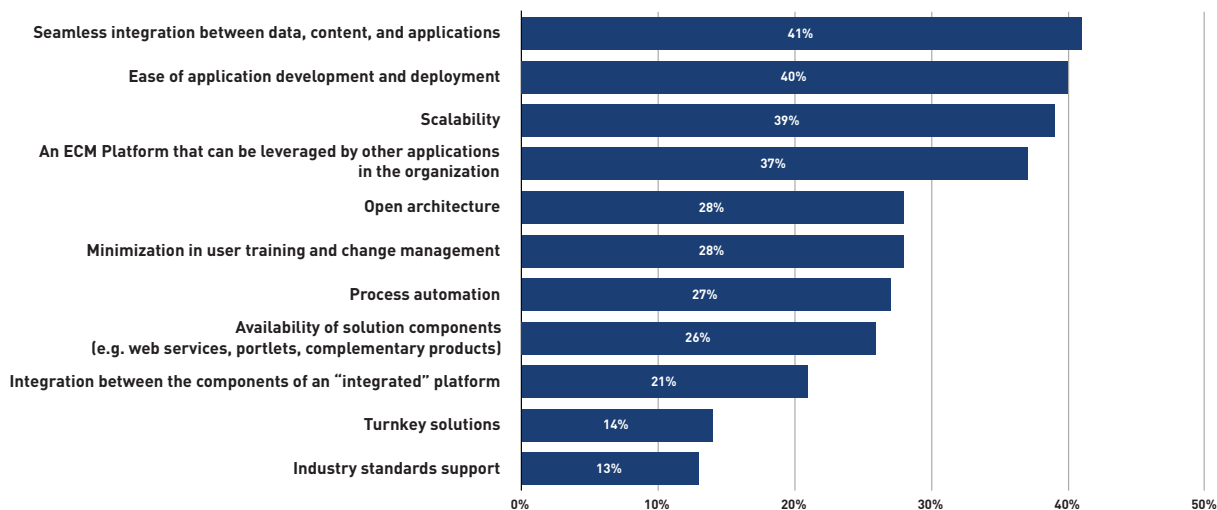
Ranking a close third and fourth, survey respondents indicated that scalability and an ECM platform that could be leveraged across the enterprise were also

important elements to an ECM solution. Clearly ECM is viewed as an enterprise competency or capability that needs to be leveraged throughout the enterprise to support multiple business functions. This capability is not only horizontal in scope, but in reach as well. The ECM platform must not only be applicable across the enterprise, but needs to be easily integrated into business processes across the enterprise via shared content, data and applications.

This is likely why when asked what they sought most from an ECM solution provider, survey respondents indicated a desire to address ECM through packaged solutions, rather than through just a platform on which they themselves can build solutions. More than half, 69% of our survey respondents stated they seek solution-based products. These solutions provide not just an integrated suite of ECM technologies, but also pre-configured integration, process models, content models and Web services that specifically address a host of business applications. Simply put, the market is asking ECM solution providers for a higher level of integration and a menu of pre-defined modules as part of a core product, that will increase the speed and ease of deployment – i.e. directly address the issues identified as the primary delays in ECM deployment.

But again, it is stressed that users are not seeking this level of integration at the cost of proprietary solutions. Only 20% of the respondents identified a willingness to accept a solution based on a standalone platform. More respondents, 31% indicated that a non-proprietary ECM platform alone was preferred over a standalone solution. For these organizations, the benefit of a solution-based approach to ECM do not outweigh the potential drawbacks of solution silos. The ultimate desire of organizations is solutions based on non-proprietary ECM platforms.

Figure 5. In Your Organization, What are the Most Important Elements to an ECM Solution?



While solution-based products are the preferred approach, the market strongly prefers these solutions be based on a non-proprietary platform that can be accessed and leveraged throughout an organization. In fact, among those that identified an ECM platform-based solution as the preferred approach, only 33% targeted a 100% or turnkey solution. The great majority, 67% targeted an 80% solution, one in which the underlying ECM platform could be customized and configured to their specific needs in the targeted solution, as well as a means to address other applications and processes not directly addressed by the solution. In this manner the platform on which the solution is built can be leveraged to broaden the scope and reach of ECM within the organization, within a “standard” toolset. This reduces the functional, interface, and repository silos in the organization, yet provides flexibility in addressing ECM needs across the organization. For example, records management and capture may be applied to one business application, while document management and search may be applied to another. The underlying platform would provide facilitated access to content in either or both applications. Furthermore, because both applications would be based on the same underlying ECM platform, software license costs, maintenance, the need for in-house software specialists, and any integration that may be necessary are all reduced.

Conclusion

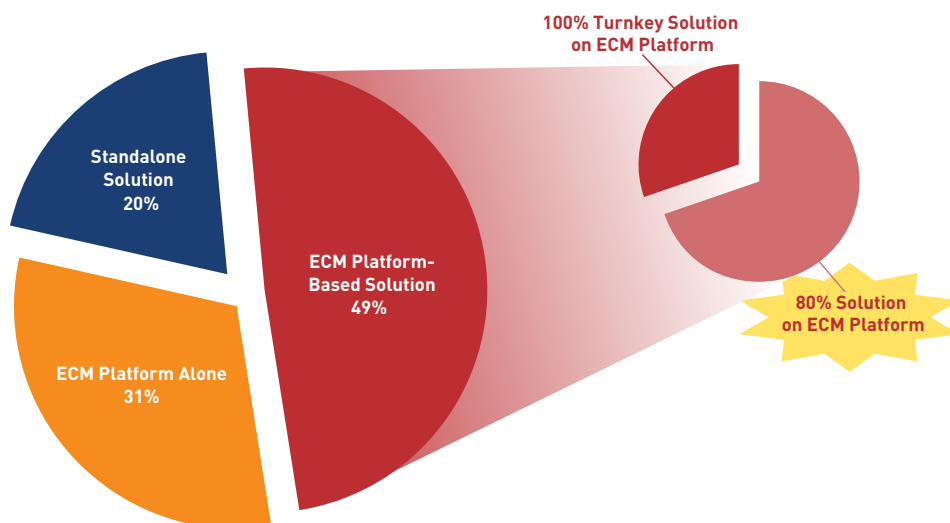
Survey findings clearly indicate that unstructured content needs to be integrated into many business processes; when it isn't a variety of challenges can occur. At the same time, ECM solution deployments take too long today. That's why some organizations are looking at more integrated content management solutions. These

solutions provide an integrated approach to content management within specific business applications and industries. These solutions can shorten deployment cycles. They encompass a full range of integrated ECM products and professional services, combined with ECM platform-certified partner technologies and professional services. Turnkey/near-turnkey solutions for specific business applications such as new account opening, loan processing, accounts payable, case management and compliance are built on components that allow for reuse of the underlying functionality. Frameworks accelerate development and deployment of key vertical and horizontal business applications and include the functionality, integration, process templates, object models and Web services components required to address these business applications.

But organizations are also looking for content management solutions that are built on reusable ECM platforms and frameworks. These ECM solution-based platforms provide a collection of infrastructure components as part of a multi-layer model and include the ECM technologies necessary for capturing, storing, managing and delivering enterprise structured data and unstructured content. The accessible/reusable underlying functionality support other business applications and specialized needs.

These solutions help organizations to streamline and automate processes, increase productivity of teams and individuals, address their information compliance and retention requirements, and lower the cost of operations.

Figure 6. What do You Most Seek from an ECM Solution Provider?



Appendix

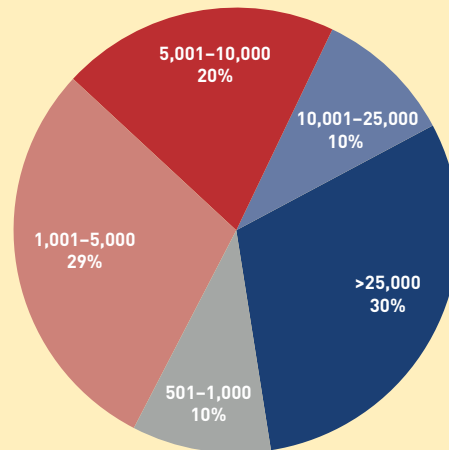
Methodology Used and Survey Demographics

Observations in this report are based on a survey conducted by AIIM International during February 2008. The survey was completed by a total of 212 individuals. The demographics of this survey population is provided in this appendix.

A Mix of Company Sizes

Using the number of employees as a benchmark, the survey audience was comprised of a fairly balanced mix of organizations of all sizes, with the exception of small (i.e. fewer than 500 employees) companies.

Figure 7. How Many Employees Are There in Your Organization?



A Cross-Industry Assessment

The survey population was spread across multiple vertical industries. No single industry made up more than 17% of the survey population.

Figure 8. In Which Industry Does Your Organization Operate?

