Structuring an ECM Programme for Sustainability

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Preface: What is ECM?

• **Enterprise:**
  - for the whole organisation, across and between all departments, functions and silos;
  - any piece of content is an enterprise asset: it belongs to the whole organisation.

• **Content:**
  - information that is produced to flow into, around and out of the organisation, embedded in one or more formats;
  - all channels and formats: electronic and print;
  - “structured” or “unstructured” information
  - BUT independent of format: what the format contains, not what it is.

• **Management:**
  - governance, processes, structures, resources and systems (not just IT systems)
  - oversight, co-ordination and monitoring
  - risk, security and compliance
Overview

1. Why this topic?
2. What do we mean by ECM Structure?
3. The risks of IT-driven ECM
4. Responsibilities of the ECM Team
5. Functional responsibilities (example)
6. What are the short-cuts?
7. What to avoid
Why this topic?

- Inspired by a discussion on LinkedIn: most respondents only dealt with IT structures
- Continued focus from Gartner on ECM as a set of IT capabilities
- Continued IT focus and driving of ECM (sales and implementation)
- Information is an institutional asset (cf: buildings, people, finance), not an IT asset
- Popularity of SharePoint and historical predominance of IT focus for SharePoint implementations
- Growing awareness (especially in SharePoint) about the need for broader spheres of governance, different roles, etc.
- Failures and comparative failures of ECM projects and initiatives
- The IT is the easiest piece of ECM, but it gets the most attention
- Lack of skills and understanding in the industry (particularly content curatorship)
- Remember: Core focus of ECM is CONTENT, not TECHNOLOGY
What do we mean by an ECM “Structure”?

- Project vs Program vs Initiative
- Roles & Responsibilities
- Ensuring governance, adequate Change Management and business buy-in
- Accounting for the full cost of (effective) implementation – not just software and customisation
- Differing structures required for high-impact initiation and ongoing line-of-business
- Timelines, roadmaps and strategic direction
- Many requirements arise that are not within IT Project scope: These need to be addressed
The risks of IT-driven ECM

- Change Management, strategic alignment, buy-in, information strategy & compliance, and communications strategy get left out of the picture. Very often, institutional repositories and teaching & learning content are forgotten.

- Costs not reflective of full cost

- Operations and key owners see ECM as an IT initiative, not a business initiative. IT is threatening and incomprehensible

- Reinforces silos, rather than breaking them down

- Solutions reflect analysts’ and vendors’ sales strategy, not real business need

- Technology cannot automate most ECM activities (like metadata management), even if it can enable them

- IT people lack many of the required skills and mindsets for some of the activities (Communications, compliance, Process Management). Techies do not understand CONTENT
What the team needs to do

- Define ECM Strategy, roadmap, policy etc. (not just IT), and align with organisational strategy (ECM strategy must guide IT strategy, not the other way around)

- Ensure up-front and ongoing compliance

- Content management: Sourcing, Editing, Publishing, and alignment of print & electronic communications strategy

- Content curatorship

- Communications and Change Management, Advocacy

- Information Architecture

- IT sourcing, development and support

- Process management, engineering and change

- Facilitate informed decision-making in all impacted areas

- Ensure academic information cycle is maintained (> Research > Teaching > Social Responsiveness >), as well as business information lifecycles (Technology can’t do this)

- Manage project portfolio
Responsibilities: Directorate/CoE

• Program Management
• Change Management
• Oversight (end-to-end view)
• Policymaking, Governance monitoring
• Guidance and advice
• Information architecture and core metadata management
• Co-ordination and facilitation
• Business Analysis (High-level)
• Curatorship services & support
• Academic research into ECM
Responsibilities: IT

- IT Program Mgmt
- IT Project management
- Systems training
- IT landscape architecture
- Tech Solution design, customisation, support
- Business Analysis (tech)
- Systems Analysis
Responsibilities: Comms & Marketing

- Channel ownership, governance and management
- Content editorial management
- Messaging
- Visual architecture ownership and implementation
- Navigation Architecture ownership

Responsibilities: Registrar, Secretariat, Internal Audit

- Legal compliance
- Archives
- Records Mgmt capability
- Operational advocacy & support
Responsibilities: Research Office

- Requirements ownership (specialist)
- Curatorship standards definition (specialist)
- Content Curatorship

Responsibilities: Libraries

- Scholarly collections co-ordination and curatorship
- Metadata standards definition and custodianship
Responsibilities: Faculties and Ops

- Requirements ownership
- Content curation
What are the short cuts?

- There are none

- If you are going to invest in ECM, then you need to commit to the investment, beyond the IT investment

- Think of it as an ERP implementation... But with much more complex data

- If tackling one capability at a time, know the big picture, roadmap and plan
Things to avoid

- Structuring your ECM Program as a system implementation
- Structuring your ECM Program around disciplines (RM, DM, WCM, DAM...)
- Allowing IT to run ECM as an IT project
Questions?

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