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Structuring an ECM Programme for Sustainability

Richard Higgs

**ASAUDIT ECM SIG &
*Information Worker Session***

May 2012

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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?



Richard.Higgs@uct.ac.za

