

Top 10 Guidelines For Choosing an ECM Solution



About Author

Haissam Abdul Malak

Enterprise Content Management Consultant

Blog: <https://theecmconsultant.com>

Email: Haissam.abdulmalak@gmail.com

Topics

Brief history of ECM Solutions

The role of ECM Solutions in the digital transformation era

COVID19 Impact on ECM Solution Adoption

Guidelines for choosing an ECM solution

The Journey of ECM Solutions

1. Personal computers invaded organizations
2. Capture, store, manage, preserve organizational documents
3. Paperless office vision
4. The rise of document management systems

Back in the early 90's, personal computers found their ways to organizations and suddenly thousands of files were generated thus information management became complex. To combat this, companies started developing Document Management Systems to manage organizations' electronic documents such as word files, spreadsheets, and PDF files. The ultimate goal was to achieve what used to be called "Paperless Office".

Document management systems adoption was significant for their abilities to capture, store, manage, and easily retrieve documents resulting in reducing cost and improving employees productivity.

The Journey of ECM Solutions

1. Volume, velocity, & variety of information
2. Delivering the right information to the right people at the right time
3. Business process automation
4. The rise of ECM Solutions

Volume, velocity, and variety of information being generated within organizations has been in high increase, This called for a new way of managing information. What used to do the job for managing organization documents needed to cater for managing the full lifecycle of content (structured & unstructured), incorporate workflow tools to automate processes, and deliver content to the right people at the right time and right place. That's when ECM solutions started to be popular in the market (early 2000).

The goal of ECM solutions is to easily locate documents within a searchable centralized digital repository, automate key business processes, and address compliance requirements with robust security controls.

Digital Transformation & ECM Solutions

1. Every organization is on, should be on, a digital transformation journey
2. Managing content & automating processes are the building blocks of any digital transformation journey
3. Automate compliance and governance needs within your data pipeline

Digital transformation is the integration of digital technologies in all organizations aspects in order to dramatically change how they do business.

The amount of global data created annually will reach 44 trillion gigabytes by this year 2020 and much of this data is unstructured. This huge increment represents a challenge for organizations to manage, locate, and circulate their content in addition to their needs to automate data driven internal and external processes. And that is why ECM Solutions are an essential building block of any digital transformation journey

Covid19 Impact on ECM Solution Adoption

1. Organizations focusing on resilience
2. Adopting new work methodologies through digital technologies
3. ECM solution providers showing significantly high interest.

The corona virus has forced companies to focus on resilience and think about new ways to do business that shall minimize data exposure, maintain business continuity, and improve collaboration through information management technologies.

During Covid19 ECM solutions adoption has been significantly high, in fact one of the top ECM providers have seen 40% increase in sales in Q3 2020 and this shall continue post covid19 era as organizations have imposed or seriously considering imposing working from home permanently.



TOP 10 Guidelines For Choosing ECM
Solutions



One of the core features that an ECM solution must have is a robust and flexible document management module allowing to manage the full life cycle of your organizations content, from capture to preservation.

These are some of the most important features to look for

Check in/out: the ability to lock a document when being edited, create new versions, and keep history of what was changed and by whom.

Security & Access Control: Role based security and other security features like access control, audit trails, integration with active directory, file & data encryption, backup, document watermarking, digital right management.

Search & retrieval: Easily locate documents based on metadata or FTS. Additionally the solution should provide advanced search mechanism.

Version control: Automatic version control, the ability to see the list of versions, rollback and always make sure you are working on the latest version of a document.

Indexing & Classification: document indexing is the process of associating information with tags allowing for easier retrieval.

Document classification is the act of labeling documents into categories according to their content such as drawings, financial reports, contracts, agreements, etc.

Audit Trails: The complete history or log of any activity being performed on a document such as creation, modification, deletion and so forth

Multiple Capture Methods: Scanning (Multi-function device, Mobile cameras), Document Imaging (Tiff, JPEG, PDF, GIF), Forms Processing, Recognition using world class OCR (make sure the your languages are supported), Bar code.

Administration: The ability to manage all your enterprise content, security, document types, metadata, search using one portal



The BPM module will give your organization the ability to start automating vital processes with an ultimate goal of improving accountability, productivity, and efficiency.

What you should look for in an ECM solution is having what is being called now in the market by low code business process automation.

- 1- **Visual Workflow Designer:** The ability to model your organizations' internal processes without the need to be an IT expert (low code).
- 2- **Visual Form Designer:** Business experts can design their own responsive form to collect information and drive a specific process without the need for any programming skills.
- 3- **Responsive Design:** Forms should auto align based on running environment such as Desktop internet browser, mobile & tablet browsers.
- 4- **Administration:** Powerful administrator to monitor processes, restart, publish workflows, etc.
- 5- **Business rule engine**

Improved & Secure Collaboration



PARALLEL
COLLABORATION



SHARE



COMMENT



ANNOTATION

Sharing documents internally (between departments) or externally (clients, subcontractors, suppliers) is a common day to day task in any organization. The majority of companies are still relying on email or cloud solutions (i.e. EFSS) for completing this process however, this poses a lot of concerns including the possibility of losing track of what was shared, commented, and the correct document version to review in addition to the security risk of having the document sent to unauthorized persons.

The collaboration module is very essential component provided by ECM solutions as it allows users to work on the same document in one controlled environment and guaranteeing that employees are working on the latest version of the document.

Identifying your collaboration business needs is also critical before choosing an ECM solution as some providers address perfectly simple collaboration (share documents for read only or edit), commenting and in addition some providers address the advanced collaboration mechanism by providing real time parallel collaboration , redlining, content redaction, and markups.

Record Management



IMPROVED
COMPLIANCE



RETENTION POLICIES



MINIMIZE
LITIGATION RISKS



SAFEGUARD
IMPORTANT
INFORMATION

An ECM system should support both retention and disposition of information, allowing organizations to define, manage, and execute records and retention policies for all enterprise content from a single application. Records Management and retention policies helps control the creation, declaration, classification, retention, and destruction of content and business records, resulting in improved compliance, minimized litigation risk, and lower storage costs



As information became the most important asset of any organization, it is very important to minimize the risk of information falling into the wrong hands. An ECM solution will help you fulfill security requirements by controlling access to documents through the role based access permission where you will be able to define who can see, print, download or modify any document stored in the repository. You should also look for advanced security features such as file & data encryption to deny access for those having access to the deployment environment.

Integration with Existing IT Systems



TWO WAYS
INTEGRATION



REST API

Think about how many applications you use in your day to day work related activities, be it MS Office including office365, outlook, HR, CRM, ERP, etc. The ECM solution should be able to integrate with most of these line of business solutions in order to facilitate the reachability of information.

When you are evaluating ECM solutions, be prepared and have a list of your most used and critical applications and ask about the feasibility of having these applications integrated with their solution.



User adoption is a key element if you want to achieve a successful technology implementation. Make sure the ECM solution provides an intuitive easy to use interface to enable employees get on board without much needed training.

The 5 elements to consider are

- 1- Easy to use & customizable.
- 2- No technological barriers which will ensure no complete revamping of the ECM solution will happen anytime soon. During my career, I saw several organizations invested in ECM solutions in which after a while they had to completely drop or go through the process of training & migration again.
- 3- Easy to configure: that will allow the person responsible for the implementation to work faster and align with your company's vision.
- 4- Mobile Access: In a recent study, 78% of employees confirmed that they do not access to their organization content on mobile devices.
- 5- Multi Language support: Providing native language support will surely have a positive effect on user adoption.



Is your company ready to move to the cloud? Do you have the needed infrastructure such as internet bandwidth? do you have highly sensitive information?

Most of well known ECM solutions providers support these 3 options

- 1- Cloud: You don't have to deal with support, hardware infrastructure, upgrades, maintenance.
- 2- Hybrid: allows to combine both cloud and on premise.
- 3- On premise: Gives you the ability to control the environment on which the solution is running but that comes with a cost of having your own hardware infrastructure, support, maintenance, backup etc.

Prior Expertise In Your Industry



INDUSTRY
KNOWLEDGE



BYPASSING
CHALLENGES



FASTER ROI

Most of the top ECM solution providers available in the market cover the essential building blocks in each module described earlier. Yes of course there are some differences in which organizations prefer to use a solution over the other but what really makes a difference from your point of view other than pricing of course is the vendor experience in your industry. Choosing a vendor with previous experience and specialty in your organization domain will sure add value and make the implementation process much faster because of the challenges they already went through and knowledge based gained.

Vendor Strength & Solution Roadmap



LEADER



PROVEN RECORD



FUTURE ROADMAP

When you are choosing an ECM solution, you should look for providers having a significant history in this field to minimize the risk of having to change provider or go through the migration process to another solution. I advise to look into Gartner's magic quadrant for content services, evaluate each provider, and have a look into their future roadmap.

Sources

image: Flaticon.com
Idc: idc.com