Best Practices In Enterprise Content Management

FIVE TESTS TO EVALUATE CLOUD ENTERPRISE CONTENT MANAGEMENT (ECM)

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SpringCM®

THE DOCUMENT MANAGEMENT PARADOX

Every organization runs on documents. The scope of the problem grows exponentially as each year businesses create more content than all of the materials currently contained in the Library of Congress. You know that most of your content should be treated as an information asset — with a lifecycle and process to manage it better. But the pace of content growth means information moves in, out, and around the organization with little management or control.

You know the problems first hand:

- You route a document for review via e-mail, but each reviewer edits his or her copy of the attachment, resulting in several uncoordinated edited copies and much wasted time reconciling the revisions.
- You want your organization and customers to have the latest and best information for products, pricing, project status, etc. The organization lacks efficient method of sharing the most current version of documents. The result: wrong pricing and product information in the field — wasting time and possibly losing business.
- You need remote workers, distributors or clients to collaborate with teams, to contribute information and to review all types of material. For preparing proposals, sharing competitive information, managing projects, resolving billing disputes, developing marketing campaigns and much more. But due to lack of common systems someone is always out of the loop. Your goal may never be fully realized.
- You rely on email as a collaboration tool. The resulting project delay or time working around this limitation is a drag on productivity and a waste of time.

The demand for access to content has never been greater. The increase in mobile, outsourced and distributed workforces means that access to your information is required in more places — some of which are located outside your corporate firewall. The drive and demand for customer self-service in sales and customer support requires access to the right (and often rapidly changing) information. Yet, in today's era of increased compliance and regulatory scrutiny, the issue of tracking content throughout its lifecycle — from creation through consumption and finally through retention and controlled destruction — is becoming a business imperative with huge consequences for non-compliance.

This white paper will explore five tests to determine whether your organization can benefit from a Cloud Enterprise Content Management (ECM) solution. Proven ECM technologies improve the effectiveness and efficiency of information flow in your business, ensuring the right information reaches the right person when and where they need it without compromising privacy and security of intellectual property.

ECM comprises several related technologies. Web content management, document management, and collaboration are considered core components; other components like search engines, capture solutions, and digital asset management are often included under the ECM umbrella.

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ECM TECHNOLOGY COMPONENTS

While no definitive classification for ECM prevails, most experts agree that ECM brings together many of the technologies listed below. While "pure play" vendors that provide technology for only one of these functions exist, many vendors package several of these capabilities into suites that are designed for a specific class of problems.

- **Capture and Imaging:** scanning and other capture technologies that convert physical paper documents and forms to electronic versions for use in a document management system. This category includes optical character recognition (OCR), a process that makes these scanned documents readable and searchable by the document management system. It may include conversion and extraction to make files searchable and conversion to XML to make files or segments of files reusable in other applications.
- **Document Management (DM):** usually consists of a centralized repository in which electronic documents are stored. Revisions to these documents may be carefully controlled through a versioning (check-in and check-out) process. Content in a document management system is searchable via an embedded search engine (variations in search engine implementations can make a large difference in the retrievability of content) so that related content can be found. Security — who can access and edit highly sensitive documents — can be tightly controlled. Add-on features, such as digital signature, electronic stamping and document distribution can accompany document management solutions.
- **Collaboration and Workflow:** team collaboration capabilities allow geographically dispersed team members to manage group calendars, to coordinate document reviews and to facilitate online discussions about topics or content. More formal processes such as document routing and forms approval can be managed by a workflow system that enables structured processes to be automated and managed more tightly to reduce bottlenecks.
- **Records Management:** governs the archiving and destruction of content according to corporate policies.Electronic documents and e-mails are considered records and, as such, should be managed according to the same retention policies as physical paper records.
- **Email Management:** manages email messages as electronic documents in conjunction with traditional electronic documents. It allows emails to be centrally stored in the context of the content or project to which they pertain, which eliminates searching in both the document management system and email system. Emails may be managed as records alongside other electronic documents.
- **Digital Asset Management:** adds to specific features for managing rich media (such as sound files, images, video). Collaboration tools specific to Digital Right Management for images and proprietary content are often included in these solutions.
- **Web Content Management (WCM):** manages the creation and deployment of content for Web sites, intranets and extranets, which may begin as documents in a document management system or as images in a digital asset management system. WCM implements version control and security on Web pages. It can also use workflow for managing content approval and Web site deployment.

Team collaboration capabilities allow geographically dispersed team members to manage group calendars, to coordinate document reviews and to facilitate online discussions about topics or content.

HOW IS CLOUD DIFFERENT FROM SOFTWARE APPLICATIONS AND SOFTWARE-AS-A-SERVICE PROVIDERS?

Traditional ECM software has a long history. Over the years the number of vendors offering solutions have consolidated while the complexity of implementation and maintenance have remainded high. In some cases, an ECM software solution becomes a major enterprise capital investment.

Alternatively, as part of the first wave of Internet-enabled applications, Application Service Providers became popular. An ASP provider was a company that licensed a commercial software application (such as a document management system, ERP system, etc.) or sometimes assumed a company's licenses for its own application and hosted that application in a secure, central facility. It then licensed that application to many companies and customized the package for each customer. The result was, theoretically, a customized version of commercial applications available to users at a lower cost of ownership.

But ASPs soon discovered that the cost of customizing and maintaining versions of commercial applications for each user was more expensive than originally predicted. Customers, many of whom had moved mission-critical applications to the ASP model, soon discovered that ASPs lacked the domain knowledge to effectively customize the applications to the degree they expected, and that the resulting fees made it un-economical.

A true cloud application is configured, not customized. The result is a low-cost, low-maintenance application with behavior that adapts as your business evolves.

DIFFERENCES BETWEEN TRADITIONAL HOSTED AND CLOUD MODELS

	Traditional ASP	Cloud Platform
Application Deployed	One-to-one: Each customer bears the entire cost of maintenance and customization.	One-to-many: The software, application integration and maintenance cost is dispersed among all users.
Customization	Burdensome: Traditional customization (often through programming) is rigid, expensive to change and increases delivery time (not to mention risk).	Rapid: A true cloud application is configured, not customized. The result is a low-cost, low-maintenance application with behavior that adapts as your business evolves.
Implementation Timeframe	Long: Customization often means prolonged implementation. If additional products require integration at the hosting center, implementation is further delayed.	Almost Instantaneous: All customers use the same application. You can be up-and-running in record time.
Upgrade Frequency	Infrequently: Because the application is not multi-tenant, each customer's application must be updated individually.	Often: Several versions are released each year. All customers receive the upgraded application simultaneously.

THE NEW STANDARD: CLOUD DOCUMENT MANAGEMENT

Cloud, also referred to as Software-as-a-Service (SaaS), is a practical model that addresses the shortcomings of both hosted models and deployed software.Cloud is a new standard that changes the whole model under which software is developed and delivered. New Internet and security technologies make it possible for cloud software companies to deliver a single common application (with the ability for users to configure their own experience) to many companies cost-effectively and securely. Companies such as Salesforce.com proved the value of solutions delivered over the internet for a monthly per-user fee.

Cloud applications are designed to be configurable and deployable in a multi-tenant environment — something that the ASP hosted solutions were not designed to do. The business and value proposition of cloud makes it attractive for applications that span multiple sites or between a company and its customers, distributors and partners. Cloud, when designed intelligently, can be deployed quickly, upgraded with new functionality frequently and can reduce the burden on internal IT — features that ASPs could not deliver.

The promise of hosted applications — lower cost of ownership and fewer systems for IT to worry about — is finally available to companies that adopt cloud. When a true cloud application is used, the additional benefits of rapid deployment, constant innovation and flexibility make it the most viable application model.

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FIVE TESTS FOR CLOUD

Use these practical questions to help you evaluate your ECM project and whether cloud makes the most sense. If your project matches two or more of these characteristics, a cloud ECM solution may offer a faster and more affordable solution than installed on-premise software.

TEST 1: THE BREADTH TEST

Do you need a solution that integrates many different ECM components?

If your application needs components not often found in off-the-shelf software, cloud is right for you. For example:

- The ability to receive and send faxes directly from the application
- Optical character recognition (OCR) to transforms faxes and scanned materials into text-searchable documents
- Scanner integration to convert paper documents into electronic content
- E-forms for combining form-based data with other documents or for augmenting document processes with structured data
- Zone OCR to read specific fields on forms and to extract key information for indexing and organizing your content
- Ability to view less-common proprietary file formats such as CADs
- Advanced workflow for document-centric process automation

To include all of these components in on-premise software requires costly integration and enhancement. This introduces more complexities and time delays. Many ECM suites include pricey add-ons , but these require customization and maintenance. Configuring the various user interfaces to work in tandem is often challenging. If you won't use these components frequently, justifying the expense is difficult.

Cloud addresses this challenge directly. By integrating multiple technologies once and distributing the cost among all users, Cloud delivers broader functionality than other options at a dramatically lower cost.

TEST 2: THE SPEED TEST

Do you need a solution that works now, not in three months or a year?

Most traditional software projects follow a proven process: needs analysis; RFPs (if a new vendor is to be selected); vendor selection and then implementation, which consists of design, development and testing: deployment; and training. This process requires months to complete and will involve many teams, including IT to perform the analysis, purchasing and legal to negotiate the deal, system integrators or VARs (or internal IT) to design and implement the customizations, and training to make end users productive.

In many situations you do not have months or even weeks to select and implement a solution. The looming risk of delay is unacceptable. This is when a cloud ECM solution makes sense.

Cloud solutions are developed to meet the majority of many industry-specific needs. Because these development efforts involve input and refinement from hundreds of customers, cloud solutions deliver comprehensive functionality out-of-the-box with the following capabilities:

- Secure document sharing (with security down to the document level).
- The ability to share documents with people inside and outside the company. Unlike traditional extranets and intranets, cloud document management allows users not only to read content but also to modify it (if the users have proper security permissions).
- The ability to easily incorporate e-mails and attachments into the repository alongside corresponding documents.
- Document version control via check-out and check-in functionality to manage edits and to ensure that all team members access only the latest information.
- Shared task lists, action items and other collaboration capabilities.
- Routing and approval workflows to automate key processes and to bring visibility into the process status.

With a cloud solution, you can be up-and-running literally in hours. You simply define how many users and provide their e-mail addresses; the system alerts them to initiate their accounts. The highest quality solutions will also offer extensive, configurable capabilities that enable you to modify key aspects of the application's appearance and to better suit your needs.

If rapid deployment is your key project criterion, cloud offers undeniable benefits. While you may still need to follow internal purchasing protocol, the demands on your company will be much lower. The risk is diminished because you can generally see your application working immediately, Select a solution that offers comprehensive functionality, frequent updates and extensive configuration capabilities.

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TEST 3: THE CASH FLOW TEST

Do you face budget restrictions? Do you want to limit upfront monetary risk?

Implementing a new software system in any company involves effort. It also takes money. And regardless of software vendors' promises of low license fees, the cost of implementing a traditional document management system involves much more than just purchasing and installing software. As mentioned previously, the cost of a typical installed software package is roughly 15 percent of the five-year cost of owning and maintaining that application. Simply put, a rough estimate of your five-year cost may be six times the application software license costs. The reason becomes evident when you consider the varied costs associated with a deployed document management software solution.

By comparison, the cloud model eliminates virtually all these costs by replacing them with a modest monthly fee. This monthly fee is usually contingent upon the number of users in an account or a similar measure that increases only as deployment, use or other success criteria flourish. The advantages of this approach include:

- No large up-front cost (or cumbersome budget approval process)
- No annual maintenance fees
- A direct link between the value the solution provides and how much you pay

In addition to lower total cost of ownership, the cloud model drastically reduces risk. Most implementations are licensed upon an annual commitment. If the product does not live up to its promise, or if your needs change, your risk is capped at that commitment.

If a large financial commitment has limited your ability to take advantage of document management technology, a cloud solution provides the functionality you want without the economic risk.

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TEST 4: THE EVOLVING NEEDS TEST

Is it critical that your software application evolve easily as your needs change and new technologies emerge?

As highlighted earlier, with deployed software packages you incur the cost of maintaining and updating the application. But once deployed, on-premise software must be updated periodically or a new version installed. A time consuming process.

Although any programmed customizations enhance the utility of the software, the more extensive customizations often will not migrate to the next version of the software. As a result, when the application package is upgraded, your organization must either upgrade the application at high cost or determine not to include those featrues in the new version. Neither option offers a fast or practical approach.

Initial Cost:	Deployed	Cloud
Document management software license fees	Yes	No
Server with operating system and other software	Yes	No
Storage, backup systems and associated software	Yes	No
Implementation services	Yes	No
Ccustomization of training materials	Yes	No
System maintenance	Yes	No
Server operating system and other software maintenance	Yes	No
Backup and storage subsystem maintenance	Yes	No
Internal IT support applying software upgrades	Yes	No
Internal IT support updating application based upon business needs	Yes	No
Monthly subscription fee	No	Yes

Cloud eliminates this frustration in several ways:

- Upgrades are applied at the data center and are available to all users immediately with no installation or delay. The administrator can often approve upgrades through configuration screens.
- Because there is no software to install at each client site, software upgrades may be made more frequently. New features are added almost quarterly.
- The user community accesses the same core application, meaning new ideas and feature refinement feedback from each user benefits the entire user community.
- As a customer, you become part of this cycle, making enhancement requests that, if accepted, will be seen in the product in much more rapid fashion than previously possible.

TEST 5: THE 80/20 TEST

Can you accomplish your goals with a solution that provides most of the key functionality needed, but possibly not every bell and whistle?

A typical cloud solution will be developed from best practice content management and workflow for a given funcition, be it invoice automation, sales contracts, document management, resume management, project management, etc. Most well-designed cloud systems offer extensive interface capabilities, usually via web services that enable integration with both internal and other hosted systems. The combination of integration and configuration enables cloud solutions to meet the needs of most busiensses.

The mixture of integration and configuration is typically referred to as the 80/20 rule. But some applications may require ssome highly pecialized functionality that a cloud application may lack, even with integration and configuration.

How can you tell which side of this line your application falls on?

1. Be clear about what you want to accomplish. Be careful to indicate the other systems, facilities, groups and companies that will affect the proposed application. Sketch the workflow of the business process detailing what happens at each stage. Focus on the business processes you need to support, not the technical details.
2. Share that definition with the vendors you are evaluating. You can conduct this initial research through a formal request for proposal or an informal e-mail.
3. Request a demonstration of the cloud system as it applies to your requirements. Evaluate its ability to meet those requirements carefully. A vendor may not be able to show you every feature configured to your exact needs but should explain how the software's own configuration or integration capabilities could meet those needs.

After such an evaluation, you should have a clear idea of how much application coverage the considered cloud application will provide. Ultimately, it is a tradeoff between the incremental benefit of a truly customized solution and the cost, deployment and evolution benefits of Cloud.

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IS CLOUD RIGHT FOR YOU?

Document management, either as a stand-alone technology or as part of a broader enterprise content management (ECM) initiative, enables an organization to effectively and efficiently control and leverage its content. A cloud model will offer a robust set of capabilities to meet business challenges with the following characteristics:

- Broad use across many uncontrolled IT environments such as third-party sites and multiple companies
- Need for rapid deployment — no time for long purchase cycles and implementation
- Lack of a large up-front budget or the time to get one approved
- Need for rapid change and evolution over time but within an envelope of common functionality
- Desire for new features that are useful to others with similar problems
- Deployed easily without specialized support
- Lack of dedicated IT support

To determine whether cloud offers the best solution for your business challenge, use the five tests we've outlined. These will help you determine whether your organization can benefit from a cloud Enterprise Content Management (ECM) solution.

As we've seen, cloud ECM can quickly and affordably improve the effectiveness and efficiency of information flow in your business, ensuring the right information reaches the right person when and where they need it without compromising privacy and security of intellectual property. All without the long, complex implementation needed for on-premise software.

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ABOUT SPRINGCM

SpringCM is the recognized market leader in enterprise-class cloud platforms for managing content and business processes. SpringCM's affordable, rapidly deployable solutions enable organizations of all kinds to address their most critical Enterprise Content Management (ECM) and Business Process Management (BPM) challenges. SpringCM's solutions are trusted by customers such as the Department of Energy, Comcast, and Siemens. SpringCM partners include salesforce.com, Microsoft, and Ricoh.com.

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