

# Three Steps to Building a Successful ECM Project:

*Finding Champions, Choosing a Vendor, Choosing a Solution*

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Your organization relies on paper to get things done. But paper makes it difficult for your employees to find information, which can negatively affect productivity, customer service and vendor relations. Because paper is inefficient – it’s easily lost, stolen or damaged.

But being the forward-thinking leader that you are, you’re looking for a solution. With [enterprise content management](#) (ECM) – sometimes called document management – your organization can break free from its dependency on paper. By using ECM, you electronically capture documents and data and make them immediately available with a mouse-click.

Not only does ECM decrease your reliance on paper so you save money on shipping and storage, it also speeds your processes. By capturing paper electronically and then using [workflow](#) to automatically route it, you optimize and connect business processes so they can handle business more efficiently. Plus, ECM gives you the ability to proactively comply with regulations by increasing your transparency with [access](#) to real-time information.

The right ECM solution will [integrate](#) with all your critical applications, giving them the ability to communicate and share information. By integrating ECM with the systems you rely on every day, information is instantly available from the applications where your employees spend the majority of their time. Users quickly find what they’re looking for and focus on higher value tasks like customer service.

With a fast return on investment, deploying an ECM solution should be an easy sell, right?

Now comes the tricky part: getting other people in your organization on board.



# Step 1:

## *Best Practices for Building a Team of Internal Champions for Your Proposed ECM Project*

Enlisting other departments will make the job of selling the project easier. Working closely with our customers for 20-plus years, Hyland Software has come up with some best practices to help you share your vision with other decision makers.

Here are the top six:

### 1. Start with paper-intensive processes that affect customer service

The best places to start looking for internal champions are where paper-based processes affect customer service. For example, many financial institutions store customer-related information like IDs and signature cards at the branch where customers originally open their accounts. But when customers visit different branches, before they can even start a transaction, they're forced to wait for their information to arrive.

Do you want your customers to wait while you look for information?

Whether it's credit union members, hospital patients, government constituents, higher education students, insurance customers, manufacturing vendors or wholesale and retail consumers – if you're relying on paper, it means you're making people wait. That sends the wrong message.

Providing exceptional customer service differentiates your business, so it's a great area to look for champions. Employees who interact with customers will understand how immediate access to information is a huge benefit, both internally and externally. This will make a strong, measurable impact on business so you can make your case for expanding the solution to other areas based on needs and budgets.

***“With ECM, we've saved more than \$2.9 million, mostly in paper costs alone.”***

– Tim Arthur, IT director, Emerson Climate Technologies

### 2. Identify your team of internal champions

The higher up you go in the organization to find evangelists, the greater influence those people will have. Cultivating high-level support will also help promote the solution to the rest of the executive team. Show these people how [capturing documents](#) and information electronically gives them increased visibility into processes and empowers them to manage the business with real-time information, not best guesses based on historical information.

You'll also want to reach far and wide. The more your champions know about processes, issues and needs in other areas across the organization, the better.

Find experts to help others understand how you can optimize processes that are drowning in paper – or are simply inefficient – with electronic documents. They'll help you understand how you can expand the solution across the enterprise to share information and further increase speed and accuracy.

Now add more people to your team. A group of voices from different areas within the organization is more impactful than one voice. Early buy-in from around the company will not only spread the idea and generate usage scenarios, but will also foster user adoption.

Once you have some key people in your corner, find out what return on investment these individuals expect. The more questions you anticipate and answer, the more likely you'll be able to give the ultimate decision makers the answers they're looking for. Also, document everything you learn along the way to help build your business case (see best practice number six).

### 3. Develop your team of internal champions

Now that you've identified champions, utilize their knowledge. Find out what pains your influencers are experiencing and schedule a short session to teach these influential people how an ECM solution can quickly solve their issues. When implemented with end users in mind, manual tasks and paper-based processes that used to take days take just minutes with ECM.

Demonstrate how ECM takes their cumbersome day to day processes and automates them – minimizing their workload, increasing their efficiency and providing consistency. Once your champions see the positive changes an ECM solution brings to their world, you'll have a team full of believers.

### 4. Respect that change is challenging

Manage your project with the knowledge that many people like paper because it's tangible – they can hold it in their hands and feel connected to the information on it. Gently remind them that paper isn't secure. It can be lost, accidentally thrown away and it's always going to be [susceptible to disasters](#) like fires or floods.

Focus on the impact ECM will have on individuals – like speeding processes, increasing accuracy and making information easy to access. The more you help people understand how an ECM solution helps change their daily lives for the better, the more likely they'll be to jump on board. Some people don't like change, so introducing it slowly – gaining backers along the way – is the easiest way to achieve organizational buy-in.

### 5. Evangelize the entire organization

Now that you've built your team of supporters, it's time to let them tell everyone about the project. Effective internal communication about an ECM project can build momentum and even have a positive effect on morale and culture.

People will experience “Hey, we're really doing something about all this paper!” moments.

Set up training classes for the “new, better way” to do things. Make sure your approach reinforces that the proposed changes are a positive push, not a negative adjustment. The more people talk about how the company is thinking about making information available with the click of a mouse, the more the idea will seem like a no-brainer.

***“With ECM, users pull up the exact document in only one to three seconds. That's a 237 percent improvement. We save more than \$600,000 [per year] just with faster retrieval.”***

– Brian Mueller, ECM program manager, Colorado Housing and Finance Authority

### 6. Build a strong business case

Take all the documentation you've gathered and prepare your proposal. Decision makers and end users alike will have an easier time joining your cause when you show them how capturing documents and information electronically helps the organization:

- Automate time consuming paper-based manual processes
- Cut costs and provide superior customer or member service
- [Comply with regulations](#)
- Easily collaborate on projects
- Integrate systems

### Unite people to make your project a reality

Going into the process with these tips in mind, you'll set yourself – and your organization – up for success. The trick is unleashing your most important assets: people. The more people you can get on board, and the higher up you reach, the easier it will be to initiate an ECM project that will benefit everyone.

Now it's time to take a look at vendors.



# Step 2:

## *Choosing an ECM Vendor*

You've built a team of internal champions and a strong business case for an ECM strategy.

Now it's time to make sure you choose the right vendor.

It's not a quick and easy decision. However, by following this process, you'll be ready to navigate your way through what can sometimes be confusing terrain.

### 1. Do Your Homework

Using the information gathered when you created your internal champions in step 1, identify your most important needs. Look at areas that will impact your organization the most and provide a quick return on investment.

Once you've identified your needs, you're ready to create a shortlist of vendors. Take a look online. A good place to start is with vendor-neutral document management thought leaders. We recommend analyst research firms like [Gartner](#), Forrester Research and Cornerstone Advisors to help narrow your list.

Even with the large amount of high-quality – and sometimes not-so-high quality – information on the Internet, the best resource will always be your peers. By soliciting recommendations and talking to end-users, you often get a much better perspective on how a system will function in a real-world scenario.

Look at the client lists on vendors' websites and call a few organizations similar to yours. Ask them to share their thoughts and experiences to give you an insider's view into how they use their ECM solutions.

### 2. Cross-Examine Your Options

With a shortlist created, it's time to research each vendor's products. Be specific on your [requests for proposals/information](#) and scrutinize the answers. Asking tough questions will also give you a better feel for a total cost of ownership, not just the initial cost.

We'll cover the actual product demonstration in the final step, but when evaluating ECM solutions from a product capabilities standpoint, there are several important questions to consider:

- How well does the product's functionality match your specific business requirements?
- What are the costs required to implement and use the solution?
- How easy is it for employees to learn and use?
- What is the process for integrating the product with your existing systems?
- What is the expected return on investment?

While these questions are not all-encompassing, the answers will offer a clear picture of a product's capabilities and how well it will meet your needs. The right solution will also have the ability to expand beyond your immediate needs and become an enterprise standard. If it can't scale to meet the needs of the entire organization, it could become a one-off in a single department that can't communicate with the other core technologies you use every day.

### 3. Choose Your Best Fit

Now it's time to scrutinize the vendor itself. The reality is that every software implementation is going to face challenges. What matters is how serious they are and how you and your vendor deal with them – or better yet, prevent them altogether.

You'll want a company that will be there with you for the long-term, not a company that will "sell and run." ECM is an important investment, and you'll need guidance from the vendor before your organization can take complete ownership.

Look for a vendor that has extensive expertise in your industry so they'll know the best practices, tips and tricks to make your solution work best. On the other hand, be wary of vendors who push too many services too hard – not only are they expensive, they're also hard to maintain by yourself in the long-run.

Thinking long-term about your vendor relationship also means that you'll want to partner with a financially stable company that devotes a substantial amount of time to its product. Consistent upgrade schedules are a key identifier of how focused a vendor is on research and development.

With these three areas covered, you've figured out which type of ECM solution best fits your needs, analyzed each product and scrutinized the vendors. You're armed with the right knowledge to make a smart decision.

But before you do, you'll need to check out the software in action.

***"Users were blown away when they saw how much easier their lives just got [after we integrated with OnBase]. They were amazed. They thought it was fantastic."***

– Tim Oliver, assistant director of IT/GIS, Horry County



# Step 3:

## *Software Demo Checklist*

To evaluate competing products successfully, think about what you need in your solution. Use this checklist to help determine which elements of ECM you'd like to see demonstrated.

Ask for a demonstration that isn't just a generic show and tell. A strong vendor will show you how its product works with your organization's processes and will even use your own documents, if you prefer.

The key to this step is to ask questions. Sometimes vendors have slick demos with lots of bells and whistles, but when you look closer, the product itself is less impressive. Asking vendors if they can do something isn't enough – ask them how they do it and why they do it that way. It's a great way to figure out which solutions really have the functionality you need [out-of-the-box](#) and which will need customization.

Completing this form will help your vendor work with you to create a software demonstration that shows how ECM will have the most impact on your organization.

## Mark all the functionality you would like to see demonstrated:



### Capture

**Your important business documents and information can be everywhere – from paper in filing cabinets and boxes to information stored in various business systems. ECM allows you to take control by capturing that hard-to-find information electronically and storing it in one place.**

*I'd like to see how to:*

- Electronically capture data and information from paper, email and other sources
- Bring documents and information into one central location
- Keep my documents and information secure in one central location
- Backup my documents and information in one central location
- Manage retention requirements in one central location



### Process

**After electronically capturing your content and getting it into an ECM solution, you're ready to revolutionize your business by making documents and information instantly available anywhere in the world, completely eliminating the time and costs associated with physical transportation and storage.**

*I'd like to see how to:*

- Automatically route documents and content to different users for decision-making
- Replace paper forms with electronic forms
- Generate documentation automatically based on pre-defined data
- Find out what I'm missing for important processes



### Access

**The whole point of capturing your information into one secure, centralized system is so your employees no longer waste valuable time looking for what they need – it's all available with a few mouse-clicks.**

*I'd like to see how to:*

- Provide instant access to information – at computers in the office as well as mobile and tablet devices for users on the road
- View documents in a folder structure similar to my organization's paper folder structure
- Search for and retrieve relevant documentation based on business need
- Allow customers, vendors and auditors limited access to relevant documents





## Mark all the functionality you would like to see demonstrated: Integrate

**Integrating the important systems your organization relies on every day gives them the ability to communicate and share information. Employees don't have to leave the screens they're already looking at to find documents and information.**

*I'd like to see how to:*

- Access documents directly from my business applications
- Work and make business decisions directly from my email client
- Enable my users to interact with documents and processes right from Microsoft applications



## Measure

**Having all your documents and information stored centrally gives you transparency, visibility and control. With real-time information, you easily produce reports, analyze the health of your business and make better business decisions that impact your future growth.**

*I'd like to see how to:*

- Use executive dashboards that deliver instant visibility into the health of my business
- Easily monitor my business processes, track user productivity and evaluate overall system health
- Provide real-time snapshots of workflow processes
- Eliminate costly manual discovery and auditing of regulated documents to provide proof of compliance



## Store

**With documents – and information – stored in one central place, you have complete control over them like never before. You control records management, retention requirements and security options.**

*I'd like to see how to:*

- Implement my records management and document retention requirements
- Easily manage security requirements and eliminate the need to remember or re-enter multiple passwords, while protecting overall system security
- Track and manage any physical records and objects together with my electronic information all within the same ECM system



## Making your decision

The key to any ECM solution is how well it [solves your business problems](#) – now and in the future. Make sure you find out how easily the solution will grow and evolve with you. It should have the ability to be easily altered by IT so that it meets your needs right now and over the next five to 10 years. In a constantly changing business world, flexibility is key.

By following these three steps of building a successful ECM project, you've methodically made the case for an ECM solution and demonstrated how it will help your organization. You've built a team of internal champions, chosen a vendor and chosen a solution.

Now all what's left is the decision.

**OnBase**<sup>®</sup>  
*a Hyland Software solution*

For more information, please visit [Hyland.com](http://Hyland.com)