

## ECM Project Triage

When ECM implementations go well, the demand for ECM services, access, and functionality, both internal or external, quickly exceeds the supply. For those familiar with this challenge, read-on. For those who are not; there is another fundamental problem at hand. Assuming you are with the former group, it is difficult if not impossible to discern which projects should take precedence and how a rational decision process can be established to prioritize and staff ECM projects. This concept is not necessarily specific to ECM; however, the widespread success of SharePoint has heightened the demand for ECM services across many companies. Because of this shift in demand, it is important to introduce an ECM Project Triage process.

The demands for managing information, as many of you know, are growing out of control and if you are the responsible party for making decisions, it is a heavy burden to bear. With many companies employing multiple ECM systems, reduced budgets, reduced staff, “vocal” clients and changing priorities, it is understandable that chaos can result. ECM Project Triage is a formulaic and generally accepted process that allows IT shops, project/program management offices and/or executives to ease that burden.

As a starting step, the formulation of a Triage process should include the following factors and these should be refined (removed/changed/added to) to reflect their respective business requirements:

- Which ECM platform to use
- Business Case Justification
- Political Impact
- Complexity
- User Acceptance

### Which ECM Platform To Use

For many companies, a number of ECM technologies are being used in a production capacity. As a result, a determination needs to be made regarding which is the right ECM technology to use for the project. In the ideal world, one would align the business, functional and technical requirements with the appropriate ECM tool and pursue it accordingly. Unfortunately, it isn't always as simple. New ECM technologies are being introduced, standards change and there is always the promise of new features in the next version. To address this issue, we recommend that a Feature/Capabilities Matrix is created for the ECM systems employed within your company. Once in place, project requests can be vetted against the matrix to determine which ECM product is the right fit. Where gaps exist, or when overkill is obvious, it makes sense to call these out as they represent costs that need to be considered.

*The Goal: Which ECM Tool should be used?*

### Business Case Justification

For those of us who've been in the ECM field for a while, the business case is often undesirably elusive. The reason for this is that the concept of a business case means so many different things to so many different people. For some, it is a one paragraph explanation explaining why the investment is sound. For others, it is a rigorous exercise that requires an in-depth hard and soft cost analysis of key savings. And for most, it is someplace in the middle. Regardless of where you stand on the dial, it is helpful to have a consistent approach to determining the business case for ECM systems and this should include some type of quantitative assessment. For example, in-depth ROI justifications may dictate that it is appropriate to look at a “hurdle rate” based upon the Internal Rate of Return (IRR). Alternatively,

business cases may be addressed by calculating how many happy customers will result, or reduced business response times. The key is to include this if it is important (or exclude it) as part of your triage process.

*The Goal: Quantifiable measure of business value*

### **Political Impact**

Unfortunately, the political stature of a project often trumps other more important, value oriented, considerations. So, rather than avoid it, we recommend bringing in into the Triage equation. Assign a rating scale that provides an indicator of a high profile project. For example, a CEO-sponsored new public web-site is going to carry more weight than a team site used by 3 people. Even if these 3 people are the chief scientists of the company!

*The Goal: Provide a rating for the Political Impact*

### **Complexity**

Closely linked to the ECM platform of choice is the complexity of the project. If the project calls for integration touch points with a variety of line-of-business systems as well as complex workflow automation processes, these factors should weigh into the Triage process. For this purpose, it is recommended that a complexity rating be considered. The level of granularity in determining the complexity is going to be specific to each company and will need to be developed, often in a matrix oriented capacity.

*The Goal: Complexity Rating*

### **User Acceptance**

Users tend to have a wide span of interest in accepting or evangelizing new technologies and their opinions can often change on a dime if they are unhappy with the project's progress and results. Consequently, it is important to first gauge the users' interest level in participating in the project in addition to its business applicability. When interest is strong, it sets the stage for higher tolerance levels for change management and unexpected complications. These factors and others, which may be specific to your user community, are important factors as you assess user acceptance for the targeted community.

*The Goal: User Acceptance Rating*

When linked together, these factors and others that may be specific to your organization's IT practices, can aid greatly in your decisions about project priorities and sequencing. Once these factors are established, it is recommended that all project requests are queued for evaluations based upon your selected factors. Finally, it is recommended that a comprehensive escalation process is considered to accommodate shifting priorities. The combination of a defined Triage program along with the escalation process can provide effective project sequencing for both users and IT professionals alike.