

**ECM, ROI,  
and Success**

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Wyoming ARMA 10 March 2008

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**What Is ECM?**

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**Why ECM?**

- **Create, retrieve, manage and retain all content – paper and electronic.**
- **Meet retention, compliance, and audit requirements.**
- **Reuse content on portals and web sites.**
- **Support collaboration by integrating content repositories**

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**Basic ECM Requirements**

- **Executive sponsorship and support**
- **Strategic need to manage content as an asset of the organization**
- **Independent of department, functional, or individual process solutions**
- **Supports business policies and procedures**

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**ECM Vision**

- **Where the organization must be in 3-5 years**
- **Strategic alignment with the mission, purpose, values, and objectives of the organization**
- **Must address the culture for information sharing within your organization**

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**ECM RFP Team**

- **Business Units**
- **IT**
- **Records Management**
- **Purchasing**

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**ECM RFP Contents**

- **Cover Letter**
- **Administrative Section**
- **Technical Section**
- **Project Management Section**
- **Pricing Section**
- **Contracts Section**
- **Appendices**

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**ECM RFP Cover Letter**

- **Proposal due date and time**
- **Bidder's Conference [Mandatory?]**
- **Bidder's Intent to Respond Form**
- **Brief description of the project**
- **Information is confidential**
- **Contact Information [and who may not be contacted]**

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**ECM RFP Administrative Section**

- **Overview of the RFP**
- **Schedule of events**
- **Contact names and addresses**
- **Vendor Questions Process**
- **Bidder's conference Details**
- **Oral presentations and demonstrations**
- **Evaluation Criteria**
- **Required Proposal Format**
- **Submission information [copies, printed or electronic]**

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**ECM RFP Technical Section**

- **Issues behind the RFP**
- **Current work processes or business environment**
- **Current technical environment**
- **Description of the proposed work environment**
- **System technical requirements**
  - Description of the work application
  - Description of communications/network needs
  - Description of security requirements
  - List of constraints (i.e., Windows environment)
- **Table or matrix of digital/hard copy objects**
- **Table or matrix of number and levels of users**

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**ECM RFP Technical Requirements**

**Samples**

- **Vendor shall describe how system supports metatagging.**
- **Vendor shall describe how to import existing websites, data, and other objects.**
- **Application shall support a variety of viewable formats including PDF, HTML, and Microsoft Office viewers.**
- **Retention of objects may be calculated by calendar dates or triggered by an event.**

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**ECM ROI Management Section**

- Project management and implementation plan
- Project schedule
- Site preparation requirements
- Application development plan
- **Basic, User, and Acceptance testing**
- **System acceptance test plan**
- Maintenance description and schedules
- References
- Training (description of class and schedule)
- Documentation (paper manuals, CDs, online)
- Staffing requirements

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**ECM ROI Pricing Section**

- **Application Development**
- **Application Software**
- **Hardware**
- **Maintenance**
- **Training**
- **Documentation**
- **Project Management**

**Per User = Apples to Apples**

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**ECM RFP Contracts Section**

- **Include a draft contract or purchase agreement.**
- **Require vendors to**
  - Review the draft and determine whether they will accept it;
  - Or, if not, explain the issue[s] and suggest what is acceptable.

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**ECM RFP Appendices**

**Examples**

- Workflow analysis of the business processes
- Network diagrams
- Current servers, desktops, etc.
- Organizational charts of the departments
- Suggested rules for taxonomies and metatags
- Retention schedules and corporate policy
- Records by status [active, inactive, on hold]

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**ECM ROI**

**Examples**

- Cycle Time Reduction (15-65% faster)
- Reduced Effort/Overhead/Transaction Cost (Reduce Cost 25-55%)
- Compliance – Risk of Audit/Regulatory Violation & Penalties (Cost Avoidance – Risk Adjudication)
- Improved Response = Improved Revenue (Add 3-9% Revenue)

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**ECM RFP Resources**

[www.aiim.org](http://www.aiim.org)

[www.ecmstrategy.com](http://www.ecmstrategy.com)

[www.intelligententerprise.com](http://www.intelligententerprise.com)

[www.cmswire.com](http://www.cmswire.com)

[ecm-stuff.blogspot.com](http://ecm-stuff.blogspot.com)

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10 March 2008

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