



# 5 Pillars of Success for Enterprise Information Management (EIM)

## Moving ECM to the Enterprise

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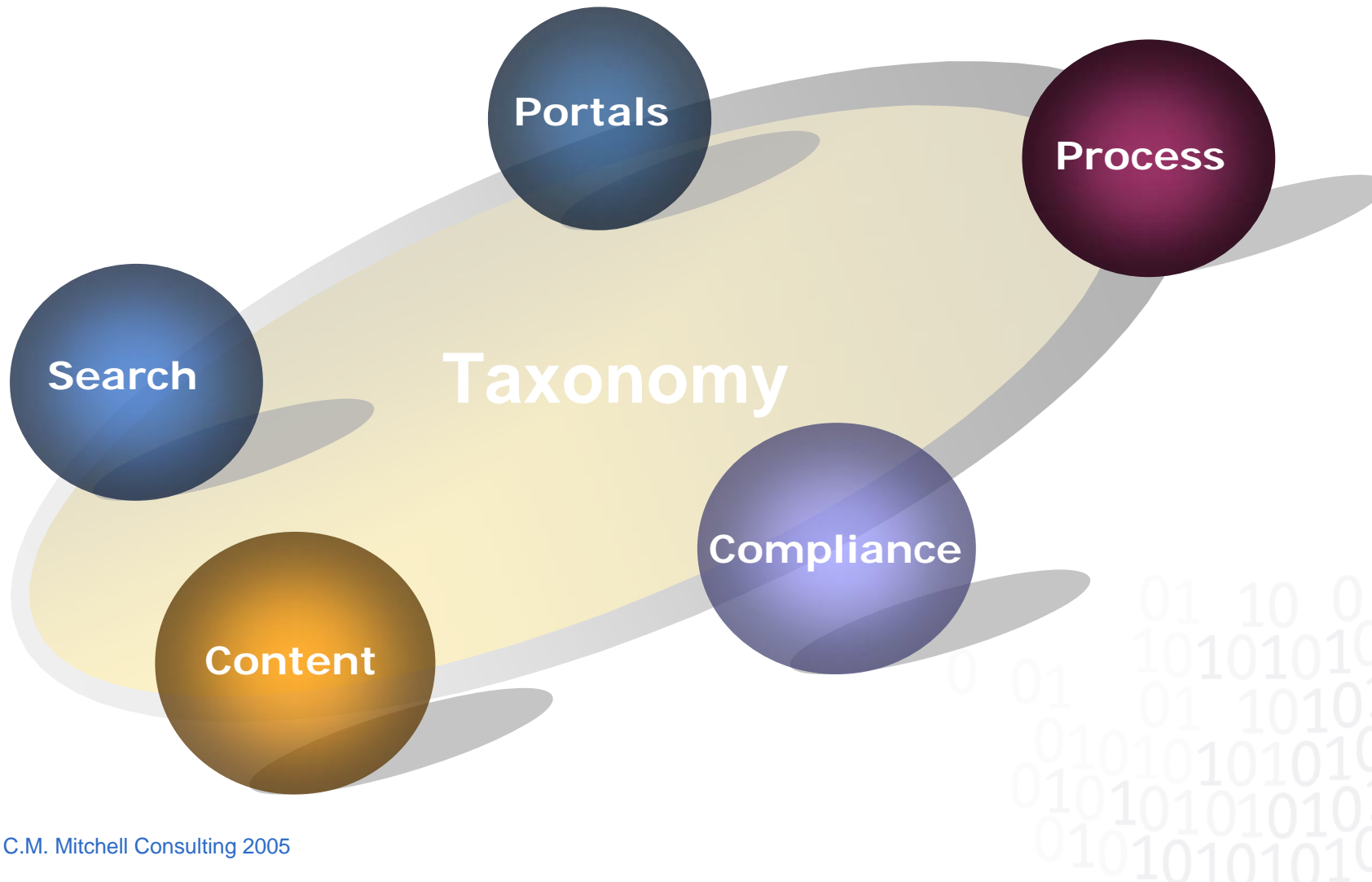


# Are you managing content or information?

- **“If only HP knew what HP knows”**
  - Lew Platt, former CEO of Hewlett Packard
- **“Power is knowledge shared”**
  - Reid Smith, Chief Knowledge Officer, Schlumberger
- **“EIM will become critical as companies move toward architectures that support business efficiency and agility by design”**
  - Gartner



# Taxonomy is the Core of EIM





# Taxonomy: Categorization or classification according to a pre-determined system

- Risk: Information that is wrongly or inconsistently classified is essentially lost to the organization. In order for information to be useful, one must be able to find and apply it.
- Resolution: Implementing standard taxonomies offer numerous benefits for the company such as:
  - Common classification for more effective search results
  - Intuitive portal design reflective of classification patterns
  - Classification consistent with record retention schedules
  - Simplified integration with external applications
  - ECM that reaches beyond departments

WIN: Your taxonomy will drive your portal strategy and enable enterprise level search. Taxonomy is the key to managing information.



# Records Management: Managing the “corporate memory” of business decisions for compliance

- Risk: Most companies have Records Management functions to deal with physical records. Few companies treat their electronic records as they do their physical records, leaving them open to legal risks and non-compliance.
- Resolution: Implementing a program that incorporates electronic records, including e-mail, as well as physical records, will enable the company to meet compliance goals as well as improve overall access to information. Managing the information lifecycle is managing risk.

WIN: Use your Records Inventory to feed your information management direction and shorten taxonomy development time

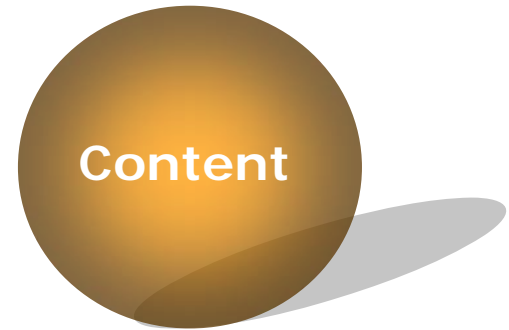




# ECM: A foundation technology for EIM

## ECM Technologies include:

- Document Management
- Image Management
- Business Process Management
- Web Content Management
- Forms Management
- Records Management (Including Email Management)
- Collaboration
- Digital Asset Management / Multi-Media Management



WIN: ECM can be a foundation for other initiatives such as Knowledge Management



# Enterprise Search: It's not enough to simply store information. It must be easily located

- Risk: Searching only the content engine or only the web provides inconsistent results that are often out of context. Users may be making decisions based on incomplete information.
- Resolution: Enterprise search engines are now commonplace for corporate intranets. These search engines, when integrated with content engines and other data sources, provide the secure information access that users are expecting and from the interface they expect to use.



WIN: Enterprise Search puts content in context of related information



## Portal: An entrance or a means of entrance: I.E. The local library, a portal of knowledge



### Portals

- Risk: ECM, when not integrated with a corporate portal, creates another silo of information. Today's users expect to "Google" for information, including related content in a secure fashion.
- Resolution: An enterprise information portal that integrates enterprise search capabilities is a familiar interface expected by most corporate users. This portal is a reflection of the enterprise taxonomy which, in turn, is a reflection of the way users classify and search for information.

WIN: Portals that reflect the taxonomy provide natural vehicles for showcasing content in context.



# The Importance of Taxonomy

Taxonomy driven portals provide an intuitive interface that guides/drives access to corporate information resources.

**Portals**

Standard Taxonomy decreases the overall time to automate core processes by standardizing interface definitions

**Process**

Standard taxonomy improves overall search capabilities improving efficiency

**Search**

**Taxonomy**

Records/content inventories shorten taxonomy development and feed ECM systems

**Compliance**

**Content**

Content systems manage all unstructured content for the enterprise and are reflective of the enterprise taxonomy



## Governance: The process of making and administering the policy and affairs of; to regulate

- Risk: Lack of a standard governance model leads to inconsistent policies and procedures related to content and lack of oversight into critical issues such as Security and Lifecycle. This opens the company to compliance non-conformance and other risks.
- Resolution: A governance program ensures the company that quality and consistency are enforced for all information related policies and procedures.

WIN: Places accountability with the content owners while enlisting subject matter experts such as Legal and HR to facilitate compliance.



# 5 Pillars for success in EIM

**#1 Make it easy and intuitive**

**#2 Know what and where your content is**

**#3 Know your information sources**

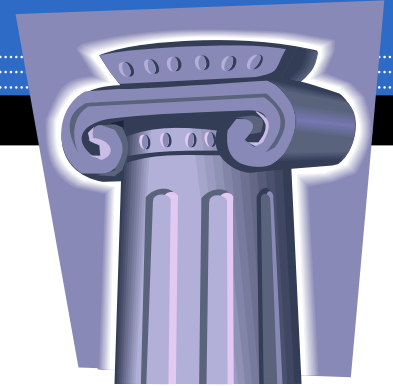
**#4 Standardize your taxonomy**

**#5 Plan for the enterprise, but implement as it makes sense for the organization**





# 5 Pillars for success in EIM



## #1 Make it easy and intuitive

- The most successful solutions are the easiest to use
- Most users don't need all of the bells and whistles
- Drive users to the information they want rather than making them dig for it



# 5 Pillars for success in EIM

## #2 Know what and where your content is

Few companies have taken the time to complete a content inventory. To gain the most from your unstructured information resources, you must know what it is and where it resides.





# 5 Pillars for success in EIM

## #3 Know your information sources

Content in context requires a full understanding of information sources including:

- ERP Systems
- Legacy Systems
- Departmental Solutions





# 5 Pillars for success in EIM

## #4 Standardize your taxonomy

Standard taxonomies should be in synch with key applications and be reflective not only of the content, but how people use that content. In the information age, companies that are more efficient will gain the competitive advantage.





# 5 Pillars for success in EIM

## #5 Plan for the enterprise

Systems that are planned and implemented at the departmental level usually cannot expand beyond the department without major revision. Advanced planning reduces overall deployment costs and increases overall end-user satisfaction.

