Enterprise Content Management

# Overview and Update

May 27 2015

Management Committee Presentation

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# Background

- Enterprise Content Management (ECM)
  - Strategies, methods, and tools used to capture, store, preserve, and deliver content and information to an organization (AIIM, 2015)
- The Council manages millions of records in multiple formats every year
- Successfully utilized, ECM has the potential to:
  - Enhance security and COOP efforts
  - Expand collaboration and information-sharing
  - Support business process improvement
  - Improve internal and external customer service
  - Maximize Council resources

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# Organizational Impact and Approach

- ECM and Thrive 2040
  - Equity, Sustainability, Integration, and Accountability
- Met Council Strategy Areas include:
  - Records Management
  - Workflow and Forms
  - Document Management and Imaging
  - Business Intelligence
  - Collaboration
  - Web/Digital Asset Management

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# Historical Outcomes

- Current, limited implementation of existing ECM tools have generated measurable benefits for the Council
  - ApplicationXtender
  - SharePoint
  - Workflow/Dashboards

- Challenges Remain
  - Access between divisions and departments
  - Information Governance
  - Existing paper processes
  - Upcoming retirements

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# ECM Strategy Committee

- Two representatives from each division
- Identified initial division-level issues, challenges, and ideas surrounding the management of information
- Defined ECM from a Council-wide perspective
- Recommendation to the Executive Team regarding a Council-wide ECM initiative and strategy
  - Multi-Phase Assessment
  - Goal: Strategy plan by the end of 2015

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# Current State Assessment: Phases

| Conduct Stakeholder Analysis | • Goal: Identify key stakeholders<br>• Expected completion: 2$^{nd}$ Quarter 2015 |
|---|---|
| Identify Priorities and Develop Metrics | • Goal: Identify priorities; develop metrics to track progress<br>• Expected completion: 3$^{rd}$ Quarter 2015 |
| Develop Communication Plan | • Goal: Define and implement communication structure<br>• Expected completion: 3$^{rd}$ Quarter 2015 |
| Map Existing Technology Utilization | • Goal: Identify existing technologies and integration<br>• Expected completion: 4$^{th}$ Quarter 2015 |
| Review of Existing Staff Resources | • Goal: Identify staff currently engaged in ECM activities<br>• Expected completion: 4$^{th}$ Quarter 2015 |

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# 2015 Expected Outcomes

**Four Key Objectives**

1) Complete the current state assessment process
2) Implement a committee structure to support and communicate ECM activities
3) Create initial performance metrics and benchmarks to track progress throughout the multi-year implementation
4) Develop and present an ECM implementation strategy plan

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# **Questions?**

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