

## TAMING THE CORPORATE CONTENT EXPLOSION: AN ENTERPRISE CONTENT MANAGEMENT FRAMEWORK FOR SERVICE ORGANIZATIONS.

By Doug Armstrong and Jill Schubmehl

To protect its intellectual capital and achieve a positive return on its investment in enterprise content management, an organization must do 10 things well—from defining a clear content management vision to establishing the right metrics and performance measurement processes. This requires looking holistically at the people, processes, and technology that together enable the organization to create, capture, store, share, and maintain content.

For services organizations that run based on the expertise and experiences of their most senior professionals, managing intellectual capital and enterprise content isn't just a nice to have; it is vital to their viability and success.

Many organizations undertake robust enterprise content management or knowledge management strategies as one way of capturing and sharing intellectual capital—the specialized knowledge of their busiest, most experienced, most valuable personnel. These programs not only seek to protect this valuable organizational asset—which typically resides in the many documents, or “content,” produced by knowledge workers—but also to achieve a variety of business goals. When approached properly, enterprise content management programs can produce significant benefits, some measurable and some not. For example, they can help an organization:

- ◆ Improve productivity and deliver services efficiently
- ◆ Reduce storage and printing costs
- ◆ Demonstrate capabilities and credentials more effectively
- ◆ Integrate new personnel quicker
- ◆ Reduce the time required to train staff and transfer knowledge

Too often, though, commitments to improving enterprise content management have the opposite effect, resulting in thousands upon thousands of documents that are:

- ◆ Not kept up to date
- ◆ Difficult for content owners to maintain or publish
- ◆ Not easily searchable
- ◆ Maintained in silos and not shared across units

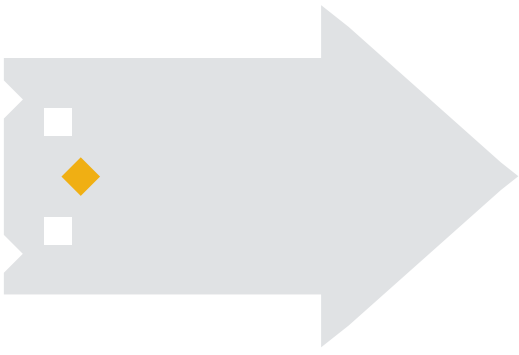
As a result, people continue to re-create the wheel. The content proliferation continues. And the company's content management costs—both “hard” costs such as storage capacity and “soft” costs such as employee productivity—continue to rise.

### WHAT IS ENTERPRISE CONTENT MANAGEMENT?

The term “enterprise content management” can cause a bit of confusion, as it is often used interchangeably with others such as knowledge or document management. Regardless of the term that a company uses to describe its particular initiative, the important thing to recognize is this: content or knowledge management is more than technology; it is a platform for creating a knowledge-centric organization that captures and leverages valuable enterprise knowledge to improve competitiveness and performance. In other words, it is a holistic approach for delivering the right information to the right people at the right time.

In this article, we do not focus on the definition of enterprise content management, as the term gains meaning when it is viewed in the context of the industry and organization in question. Rather, this article describes certain elements that must be present for an enterprise content management initiative to have a meaningful, measurable impact on the business.

**TOO OFTEN, COMMITMENTS TO IMPROVING ENTERPRISE CONTENT MANAGEMENT HAVE THE OPPOSITE EFFECT.**



## TEN CRITICAL SUCCESS FACTORS

We have found that, to achieve a positive return on the investment in an enterprise content management effort, an organization must do 10 things well. It must establish:

- ◆ A sound enterprise content management vision
- ◆ A content governance strategy
- ◆ Content customization and personalization capabilities
- ◆ A practical content organization structure
- ◆ Enabling technology(ies), integrated with key business systems
- ◆ Business processes and work flow
- ◆ Real-time collaboration
- ◆ Infrastructure, including both people and technology, to support the effort
- ◆ User adoption
- ◆ Metrics and measurement processes

## ENTERPRISE CONTENT MANAGEMENT VISION

A key starting point is a clear vision—one that has been developed by and is shared among all stakeholder groups. The vision should outline:

- ◆ Specific performance objectives and the organization's expected benefits
- ◆ Metrics and the measures according to which the company will assess return
- ◆ The time frame over which it will achieve the objectives
- ◆ Definitions of each audience and user segment
- ◆ A statement of benefit, including a clear and compelling value proposition, for each user group that will interact with the program
- ◆ Scope of the effort; i.e., does it include internal content only or does it extend to customers and/or vendors and business partners?
- ◆ Scope of the knowledge involved: product, customer, market, competitor, employee, business process, etc.

## CONTENT GOVERNANCE STRUCTURE

Because of its often complex scope, enterprise content management requires strong leadership—including a governance structure and set of principles—to keep it on target and focused on the vision.

From a sponsorship level, the effort should have a clear project leader, champions, and a steering committee that includes representation from key business and IT stakeholders. This group works together to set the vision, to direct and support the implementation, and to assess progress and return on investment. These individuals are responsible for enforcing elements of the vision; for example, redirecting a department's "rogue" effort to create its own proposal toolbox so that it becomes part of an existing enterprise initiative to establish a single proposal-support resource. While newer "tools" make it easier for non-technical people to create and share knowledge, without guidelines and enforcement these tools can contribute to the opposite problem: duplicative efforts.

Importantly, governance principles should strike the right balance between centralized direction and decentralized input to ensure buy-in and commitment across the organization. Centralized elements may include:

- ◆ Branding
- ◆ Taxonomy (a common classification scheme that ensures consistency across diverse groups)
- ◆ Support processes
- ◆ IT application development and technology infrastructure to ensure compatibility and facilitate integration

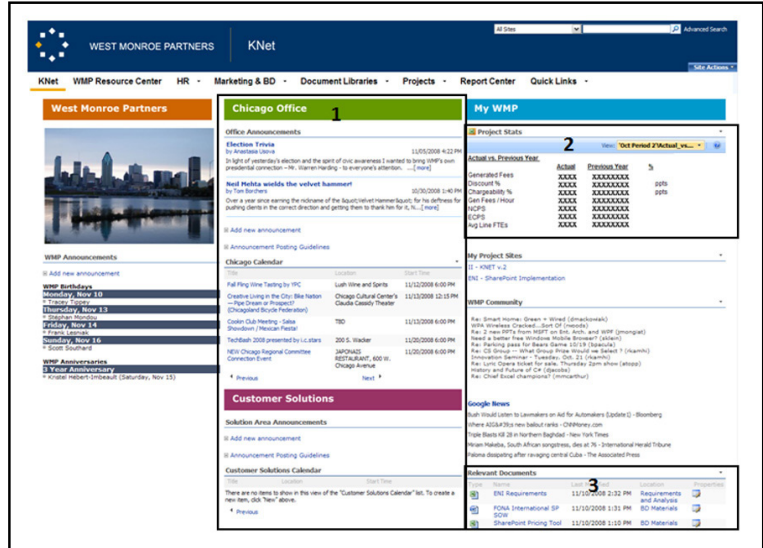
Departments or affinity groups, on the other hand, may play a role in establishing processes and policies around content creation and maintenance. They should designate "owners" who are responsible for ensuring that content is appropriate and up to date. In addition, they may establish specific guidelines for how their users will interact with the content; for example, which individuals may be writers, reviewers, approvers, or consumers (readers) of the information.



West Monroe Partners has carefully considered these factors in the development of its KNet intranet portal. Typical of many professional services organizations, the company customizes information by key aspects of its operations: geography, service line (functional specialty), practice group (groups of service lines), and industry specialization. This enables individuals to search for content easily within the affinity groups to which they belong.

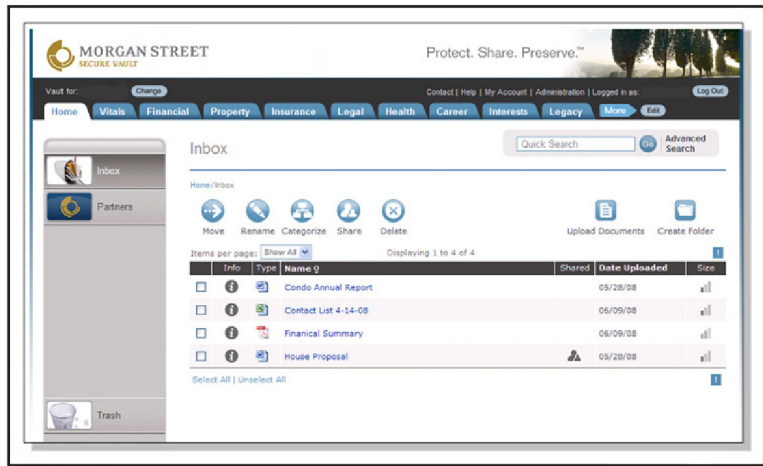
At the same time, the company has taken steps to personalize the portal experience by delivering information specific to individuals. In addition to providing access to affinity group information, each team member's personalized portal includes instant access to:

- ◆ Key performance metrics such as new business opportunities originated
- ◆ Personal documents
- ◆ News filtered by areas of business and personal interest



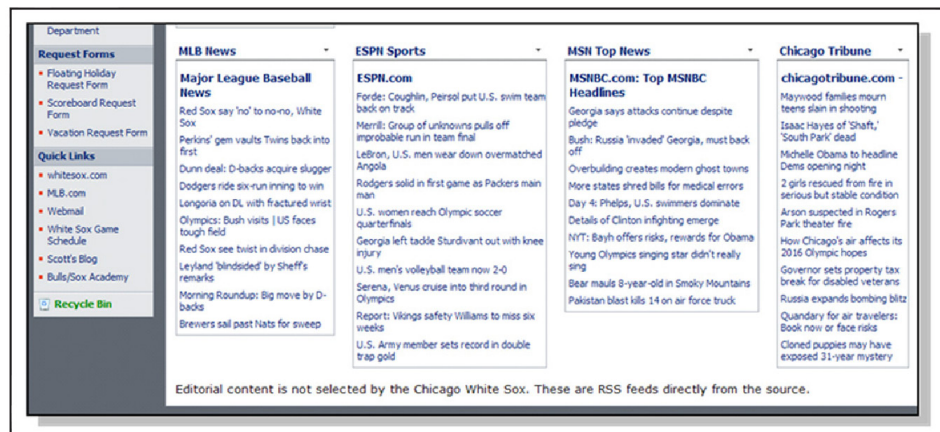
Above at right is an example of West Monroe Partners' intranet home page.

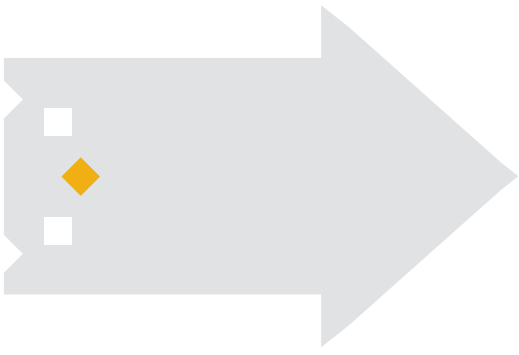
1. The central column features a targeted section for each office location and solution line
2. The second section features live key performance measures
3. The bottom section reflects the user's recently accessed documents



At times a firm may want to customize the user interface and content layout for the application, as is the case with Morgan Street Document Systems' SecureVault product offering, shown at right (middle). This layout uses the elements of an out-of-box layout, but not in their standard format.

Finally, an organization can use personalization features to deliver customized news feeds, as demonstrated on the Chicago White Sox portal page at right.





### CONTENT ORGANIZATION STRUCTURE

Companies with diverse or multidisciplinary operations must give careful thought to categorizing and organizing content in ways that enable users to find information relevant to their roles and responsibilities. This requires centralized attention to three specific areas:

- ◆ **Information architecture**—a “map” that reflects content areas and their relevance to each other. This typically will include categories and subcategories of information, organized in a logical structure according to the company’s overall operations.
- ◆ **Taxonomy**—the “controlling vocabulary,” or functional and topical terms that facilitate users’ attempts to find information; for example, folder structures.
- ◆ **Metadata**—coding of content to facilitate users’ efforts to search for and retrieve information. Appropriate use of metadata also enables content security by using metatags that control access to sensitive documents.

Many organizations conduct content inventories or audits, as well as user interviews, to assist in defining content structure and its key elements.

### ENABLING TECHNOLOGY

There are a variety of technologies upon which companies may build their enterprise content management strategies:

- ◆ Portals, which integrate information from diverse sources
- ◆ Document management systems, which facilitate development and maintenance of documents
- ◆ Enterprise content management tools, which enable content owners to publish and maintain information efficiently
- ◆ Collaboration tools that enable teams to work together to deliver solutions, manage projects, or innovate

In designing an enterprise content management approach, it is critical to distinguish between the strategy and the enabling technology, which comprises only one element of the strategy. Used in isolation, technology is unlikely to deliver the results or the return expected.

On the other hand, technology often represents one of the most significant hard costs of an enterprise content management approach, so it is important to think carefully about what the organization really needs. Is the primary need to archive and categorize critical documents, such as legal records? Does the organization rely on a diverse set of content experts to author documents that record their knowledge and experiences? Do project teams work across dispersed locations?

Key technology considerations include:

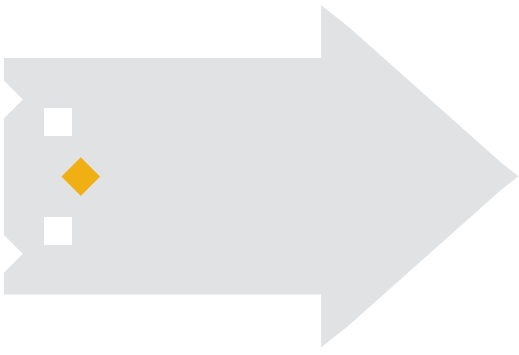
- ◆ Types of information involved
- ◆ Users’ technology skills and access requirements (when and where)
- ◆ The need for external parties (such as clients or vendors) to create or access content
- ◆ The organization’s technology infrastructure
- ◆ Content security requirements

**IN DESIGNING AN ENTERPRISE CONTENT MANAGEMENT APPROACH, IT IS CRITICAL TO DISTINGUISH BETWEEN THE PLATFORM, OR STRATEGY, AND THE ENABLING TECHNOLOGY.**

### BUSINESS PROCESSES AND WORKFLOW

Most efforts to organize and improve the way an organization manages content or intellectual capital involve defining or re-defining certain business processes, such as:

- ◆ Collecting content
- ◆ Storing content
- ◆ Publishing content
- ◆ Delivering content
- ◆ Searching for content
- ◆ Approving content
- ◆ Gathering feedback on content
- ◆ Collaborating in the use or creation of content

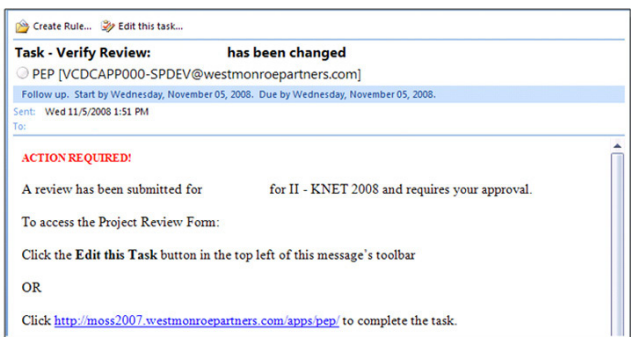


This involves establishing discipline around each of these activities. For some organizations, addressing these activities as discrete processes for the first time represents a significant change. Doing so, however, not only establishes greater consistency; it enables the organization to:

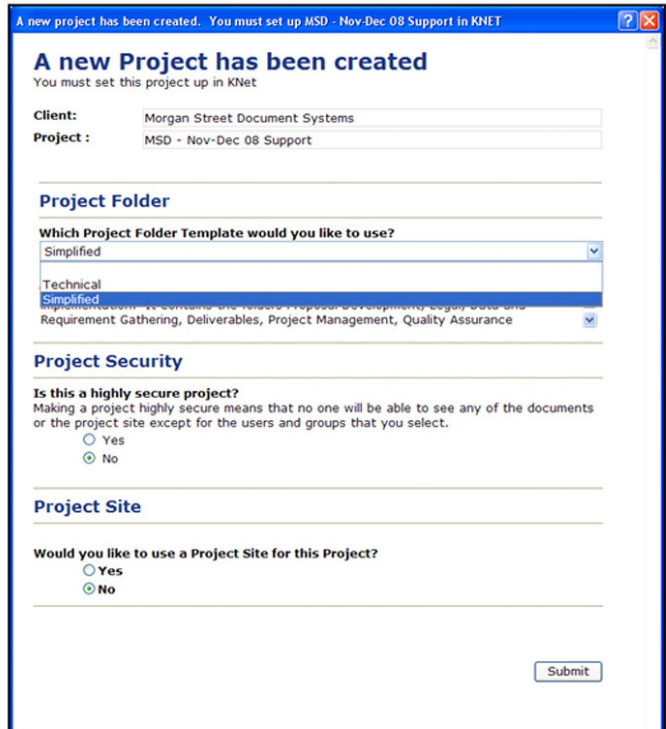
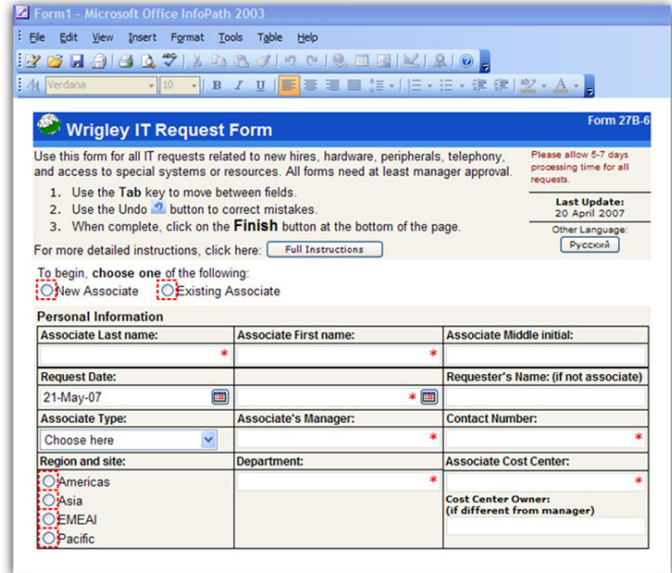
- ◆ Identify opportunities for performing key processes faster or more efficiently
- ◆ Simplify administration
- ◆ Meet users' needs more consistently

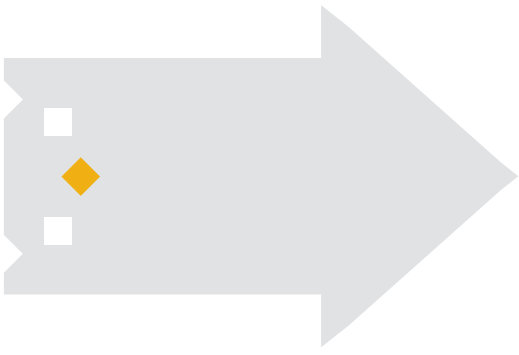
Unless an organization is solving a specific business problem, it can be difficult to measure progress or the return on investment in an enterprise content management initiative. Identifying and addressing business process "quick wins" can be one way to establish traction for a program and demonstrate interim results for a longer-term effort. In fact, starting "small" with an initiative tailored to the needs of a specific department can be a good way to build experience, momentum, and support—creating a strategy that is "pulled" by the organization rather than "pushed" by management.

One process that West Monroe Partners has integrated into its enterprise content management approach is performance management, which requires creation and review of documents and forms. West Monroe Partners has automated its Performance Evaluation Process through the use of workflow forms like the one displayed at right. These forms are sent via e-mail, through an automated system (illustrated below). This saves employees and evaluators several hours of time that would have been spent meeting to review evaluation forms.



Web page forms, such as that illustrated below from the Wm. Wrigley Jr. Company, allow users to easily contribute content to sites on their own—without technology support.





## COLLABORATION

For most organizations, the process of creating and managing content involves group rather than individual efforts. Collaboration, therefore, is an important element of most enterprise content management or knowledge sharing initiatives.

Collaboration tools range from basics that have been around for years, such as e-mail and telephone, to newer applications that promote instant messaging and social networking, to portal collaboration tools and team rooms.

There are two keys to ensuring a level of collaboration that supports the enterprise content management strategy:

- ◆ Developing a clear definition for collaboration: Who is involved? What must they do? And when, where, and how they will interact?
- ◆ Integrating collaboration tools and processes with other elements of the enterprise content management approach

At right is an example of a team site implemented at MB Financial Bank to stimulate cross-company collaboration. The site includes team announcements, a discussion board, custom document libraries, a team calendar, and other dynamic features such as RSS feeds and “Team Spotlights.”

## INFRASTRUCTURE AND SUPPORT FRAMEWORK

Like most major corporate initiatives, effective enterprise content management requires a sufficient support team with clearly defined roles. Team roles will vary by organization and according to the strategy in place, but will typically include:

- ◆ Dedicated program manager(s)
- ◆ Content administrators; roles that may include a combination of centralized (corporate) and decentralized (affinity group) resources
- ◆ IT support resources responsible for establishing the systems and tools for developing and sharing content

- ◆ IT infrastructure resources responsible for ensuring ongoing connectivity for the organization’s content developers and users

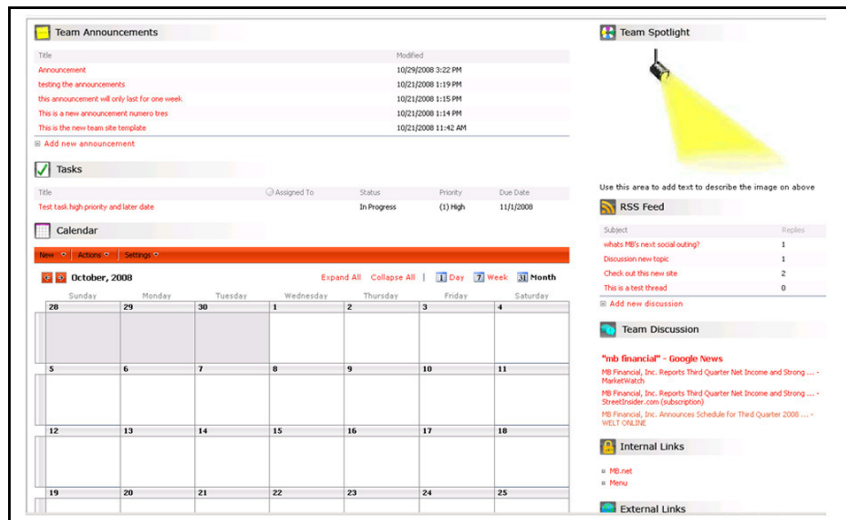
In addition to managing implementation steps and user connectivity, these support resources play critical roles in measuring progress against goals, as well as return on investment.

## USER ADOPTION.

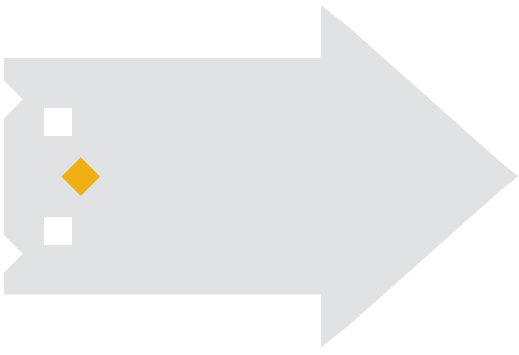
Without adequate user adoption or participation, an enterprise content management initiative will not produce the desired results—resulting in wasted effort and little return on investment.

Achieving desired participation usually requires changing behaviors. Companies must ensure that their implementation plans include a formal change management approach designed to help users understand, perform, and accept new responsibilities. This may include steps to:

- ◆ Demonstrate leadership support for the changes
- ◆ Involve users in the development of the approach, such as process changes, selection of tools, content organization, or information personalization
- ◆ Communicate clearly about objectives, expectations, and vision
- ◆ Train users to perform new or required actions
- ◆ Recognize and/or reward participation



The screenshot displays a web-based team site interface. On the left, there are sections for 'Team Announcements' (listing recent posts with dates and times), 'Tasks' (a table with columns for Title, Assigned To, Status, Priority, and Due Date), and a 'Calendar' showing a monthly view for October 2008. On the right side, there is a 'Team Spotlight' area with a yellow spotlight graphic, an 'RSS Feed' section with a table of recent items, a 'Team Discussion' section with a list of posts, and 'Internal Links' and 'External Links' sections at the bottom.



**METRICS AND MEASUREMENT PROCESSES.**

Perhaps the most challenging part of an enterprise content management strategy is demonstrating its impact on the organization, including calculating the return on what, for many, can be a substantial investment. While it is possible to quantify some benefits, others are more intangible.

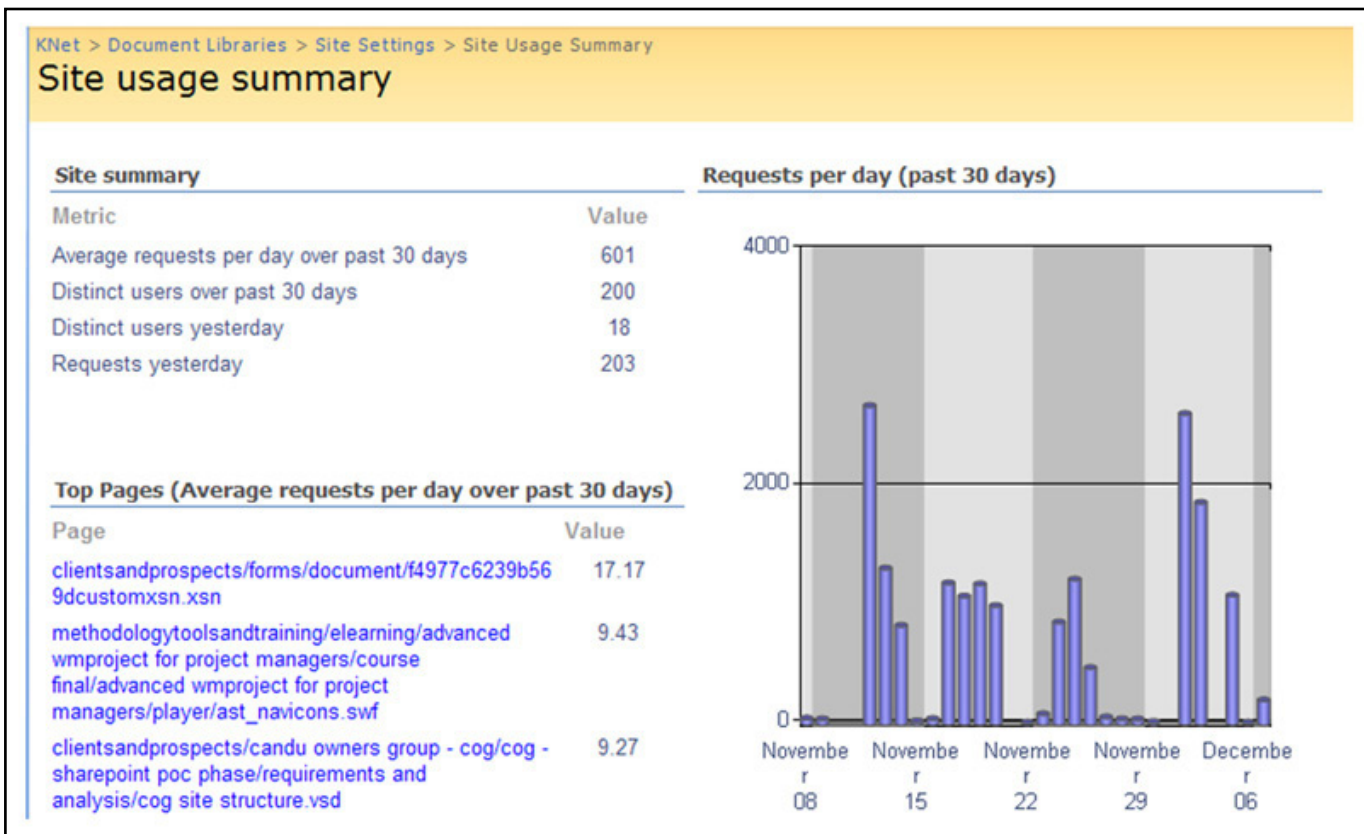
To guide any such program, it is important to define and document the business case up front, including the measures by which the organization will judge its success. Depending on objectives, measures might include:

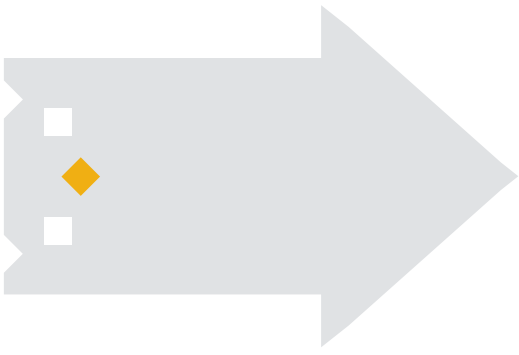
- ◆ Participation: frequency of use, contributions, or numbers of users or new users
- ◆ Process: average response time to an inquiry, time required to contribute content, or time to search for and find desired information
- ◆ Productivity: reduction in time required to complete certain tasks

- ◆ Quality: value of content to users, extent to which content is up to date, or user satisfaction
- ◆ Cost reduction: reduction in storage space or print costs
- ◆ Protection of intellectual assets: amount of content converted from personal drives to more secure shared resources, or extent of controlled access for sensitive information (particularly for organizations with high turnover)

The display below demonstrates how an enterprise content management system can provide administrators with basic metrics that enable them to see the sites or pages that users visit most frequently and, thus, understand where the organization is gaining the greatest benefits from the initiative.

Finally, companies must establish appropriate benchmarks, intervals for reviewing performance, and processes for soliciting input and/or measuring progress against goals. Most will use a combination of cost analyses, usage logs, and user surveys to assess performance and return.





## POINT OF VIEW

### WEST MONROE PARTNERS.

The ability to manage content and intellectual capital is one element of establishing an effective, client-oriented services marketing and business development function. West Monroe Partners works with many services organizations to improve customer relationship management, enterprise content management, and marketing effectiveness. The firm's comprehensive marketing and business development approach has helped it generate growth in excess of 300 percent over the past four years—resulting in its inclusion among the Crain's Fast 50 and the Inc. 5000 during 2008.

### ABOUT THE AUTHORS.

**Doug Armstrong** is a member of the management team of West Monroe Partners, where he leads the Customer Solutions practice and works with many clients to advance their customer and knowledge-sharing strategies. Doug is responsible for the company's business development function and knowledge management systems and has more than 20 years of consulting experience. He previously was a managing director with the Integration Services practice at BearingPoint and a partner with Arthur Andersen's Business Consulting practice. He is an adjunct professor at both Northwestern University and DePaul University.

**Jill Schubmehl** is a manager in West Monroe Partners' Customer Solutions practice, where she specializes in enterprise content management, portal, and collaboration solutions. Jill has managed and/or served in a quality assurance role for a number of Microsoft Office SharePoint Server 2007 design and implementation projects.

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