

8 Signs of a Lackluster ECM Implementation

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It's time to take a good hard look at your ECM implementation. Are you getting the returns that you expected when you invested in it? Frankly, a lot of organizations are not. In most cases, it's not the technology that is at fault: it's the vision. Many of the organizations that use ECM today are under the impression that getting rid of paper and getting control over their documents is an end point. It's not. The reality is that if you're only using the technology for storage, search, and retrieval, your implementation is still only in its infancy stages.

So how do you get from a lackluster implementation to one that provides superior returns? Sometimes you need to take a step back in order to move forward. Superior returns start with a fundamental understanding of your business process and ECM's enhancement capabilities.

One of the main objectives of any ECM solution is to get more meaningful use of the information that is contained within your business documents. Organizations should be able to:

- Distribute information efficiently—pushing or pulling data whenever and wherever it is needed.
- Present pertinent data along with supporting documentation—when necessary—in a context that is both valuable and meaningful to an end user. This allows end users to make informed decisions to execute their workload successfully.

With that in mind, ask yourself: could you be doing more with your software investment? Perhaps the time has come to reevaluate your process improvement strategy. Here are 8 signs of a lackluster ECM implementation:

1. You've gone paperless, but you haven't implemented automation.

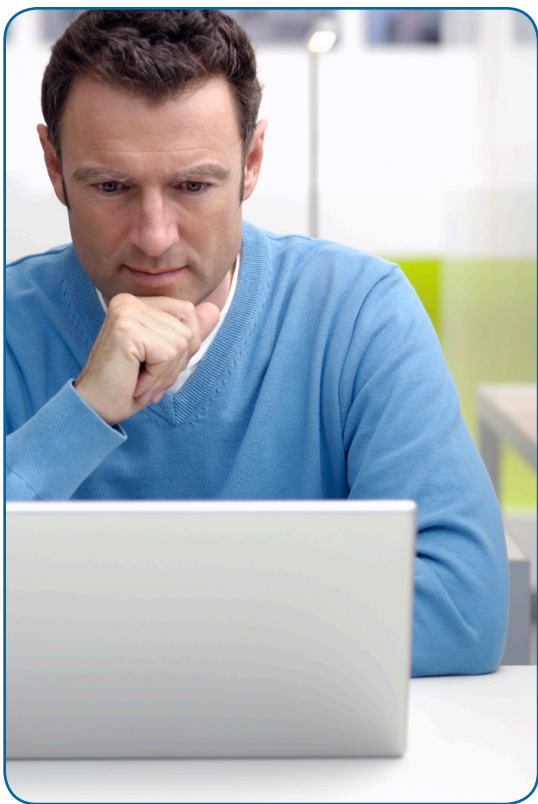
A lot of organizations mistakenly think that ECM is synonymous with document imaging. Although scanning, storage, and retrieval can definitely improve your efficiency, these abilities alone do not reflect the dynamic nature of ECM. If you hope to take your implementation to the next level, you need to automate your repetitive business processes. Automation allows you to improve turnaround and significantly reduce processing errors. At the same time, it gives you the consistency and the accountability that are required by compliance directives.

2. Data is not captured at the point of entry.

Your objective is to accelerate data capture and distribution. How can you get data into the system faster, so it can be more useful, quickly? This starts with an imaging solution that has some form of data capture (OCR, ICR, barcodes, etc.). Be advised, however, that before implementing a capture solution, it is imperative that you have an in-depth understanding of your business processes. Know what information is relevant to specific processes, and know where it has to be delivered for optimal process efficiency.



Imaging, BPM/workflow, and
Document Management Software



3. Knowledge workers are performing manual tasks.

One goal of automation is to allow your staff to use the skill set for which they were hired. Don't force them to perform tedious, repetitive tasks. A well-executed automation strategy frees your staff and enables them to perform exception handling, customer service, and other responsibilities that require analysis and critical thinking.

4. You have no self-service options in place for customers or staff.

Your customers, partners, and staff expect the availability and convenience of self-service. If you don't offer it, it is likely that they will take their business elsewhere. Electronic forms address self-service needs and enhance the satisfaction of your stakeholders. E-forms are easily integrated with existing portals and Web sites. By enabling you to expedite data capture, they let you improve turnaround while diminishing manual keying and ensuring consistent collection of information. E-forms allow you to capture, analyze, and flow data as soon as it is submitted. Can you set parameters that would enable you to process certain forms with little or no manual intervention?

5. Lack of an enterprise view.

Have your total ECM solution in mind from start to finish. If you're only implementing ECM in one department, how can you get more use out of it? How many other departments need to access information associated with this department's documents? Which processes cross multiple departments? Are you using your ECM system to improve your administrative and back-office processes?

6. Lack of systems integration.

Integration ensures that once information is captured, it can be distributed across different departments and accessed by any business application that is used to process work. LOB and legacy systems should be connected so that information housed within legacy systems can be a dynamic component of efficient business processing. Applications should be image-enabled so that your documents are accessible from within your line of business software.

7. Failure to align IT with business objectives.

Your business needs should drive your workflow/automation initiatives. Analyze, streamline, and perfect your business processes before you automate them. Solicit input from the different departments that are associated with a specific business process—from end-users to management. How can you reuse information to obtain the best return?

IT, end-users, and management should work together to develop business requirements for each workflow. Set business rules that will drive your business applications. It is imperative that your IT department understands your business objectives.

8. You don't have a strategy to process exceptions efficiently.

Your ECM system might have superior functionality with respect to integration, distribution, and workflow, but there are still going to be times when you will need to manually process documents. Business processes often have periodic exceptions, which can be hidden and hard to find. Uncover your exceptions, and develop a strategy to address them.

If you're planning to implement ECM to address a specific business challenge, don't short-change yourself. Explore the capabilities of the technology, and don't be short-sighted with your implementation. Talk with your vendor and grasp the potential that is available when you take an enterprise view. Look beyond imaging and discover the returns that you could achieve with the ability to share information meaningfully throughout your organization.



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