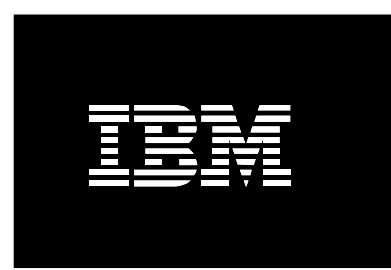


Whitepaper for  
IBM Software Services for Enterprise Content Management  
October 2008



## **Enterprise Content Management and the Center of Excellence**

### **Best Practices – Creating the Foundation for an Enterprise Content Management Center of Excellence**

*IBM Enterprise Content Management Lab Services*

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## Executive Summary

Enterprise Content Management (ECM) isn't just about managing your corporate content – it's about doing things better across the organization. For ECM to be effective to your global enterprise, you need a well-defined vision, detailed plans, and teams that are prepared to deliver.

How prepared are you to deliver ECM to your global organization? Do you know how to define your vision or develop a plan? Where do you start? Is it better to identify your teams first, or create your list of goals? These types of questions and others often cause global organizations to delay building their strategies, which can result in the development of solutions that are at cross-purposes with each other, or multiple solutions that address the same need for various business units. With no single governing body to organize, prioritize, and address the needs of the global organization, you can easily end up with satellite systems that may help one business area or group, but which can cause issues for the organization at a higher level. Maintaining and auditing these rogue systems becomes a nightmare of one-off procedures requiring a host of support teams. But organizations that have an ECM Center of Excellence are better able to plan, execute and manage their ECM business solutions and teams to meet their global needs, thus preventing a variety of development, maintenance and upgrading nightmares.

For more than a decade, IBM ECM Services has partnered with our customers to successfully implement Centers of Excellence (COE) worldwide. By capturing the lessons learned from these implementations, we developed a framework of success criteria based on mature and proven disciplines to help organizations build a COE tailored to their specific needs. Our mission is to work in partnership with our clients to share this experience and to assist with the practical application of this experience in the client's unique environment.

In this whitepaper, we discuss how to create a solid foundation upon which to build an ECM Center of Excellence, and how a well-defined and documented plan, along with a prepared and educated staff, can help your organization meet its current and future business needs.



"...a permanent competency center that supports the efficient implementation, enhancement, maintenance, and leveraging of ECM capabilities"

### What is a Center of Excellence?

A Center of Excellence is a permanent competency center within an organization that supports the efficient implementation, enhancement, maintenance, and leveraging of ECM capabilities. When set up correctly, with well-defined plans and strategies, a Center of Excellence can help improve the efficiencies of designing, deploying, and maintaining new ECM solutions, while reducing efforts and risks and improving results.

### Why is a Center of Excellence Important to You?

When properly designed and managed, an ECM Center of Excellence can help make sure that new business solutions are planned, executed, and maintained in the most efficient manner possible. This efficiency helps speed time-to-market and reduces cycle times, while producing higher-quality solutions through the re-use of proven resources. Helping maintain focus on your individual solution needs, while ensuring business solution flexibility, also helps to ensure effectiveness across your enterprise.



- Improves efficiency
- Speeds time-to-market
- Reduces cycle times
- Enables reuse of resources
- Creates higher quality solutions
- Enables corporate governance and compliance solutions
- Ensure effectiveness across the enterprise

## First Steps

Creating a solid foundation ensures your ECM Center of Excellence is set up for success. For best results, put these two pieces of the foundation in first.

✓ **First: Get an executive sponsor**

Having executive sponsorship is important for any new corporate initiative. An executive sponsor supports the COE by working with other executives to drive COE initiatives across the organization, which in turn creates positive working relationships between inter-departmental teams. Find an executive who will be an active participant of the COE, who is committed to the team and its goals, and who makes him- or herself available during times of high activity within the COE.

✓ **Then: Identify the necessary players**

As with any team, you need many players to support an ECM Center of Excellence. Program and Project Managers, Enterprise and Solution Architects, Software and Process Engineers, ECM Consultants, and other experts will help plan, design, build, test, deploy, and maintain your ECM solutions.

The people identified to fill these roles will become permanent members of your COE, not just resources 'borrowed' from other teams. Take the time to identify the right people for each role – people who are dedicated to delivering and maintaining well-designed business solutions for your entire enterprise. Each team member should have a skills-development plan and access to any classes he or she may need. Many vendors offer on-site skill-sharing classes. Consider hosting an event like this for your global teams so that each team member has access to the same pool of information.

### **And Remember:**

An executive sponsor works with other executives to get your ECM Center of Excellence the support and attention required for success. Be sure your sponsor has the time, interest, and commitment needed to support your COE, its team members and initiatives.

*Best Practices for  
Building an ECM COE*

- ✓ Get an executive sponsor
- ✓ Identify the necessary players

## Next

Once the executive sponsor and team members have been recruited, you're ready to put in the next two pieces of your ECM COE foundation.

### *Best Practices for Building an ECM COE*

- ✓ Get an executive sponsor
- ✓ Identify the necessary players
- ✓ Define your goals
- ✓ Develop roles and responsibilities

#### ✓ **Define your goals**

It's easy to lose sight of the bigger picture when you're working on individual projects. Clearly defined and well documented goals focus your teams on priorities that benefit the enterprise-at-large, while delivering ECM solutions that solve departmental or situational issues. Too often teams get distracted from organizational needs when working on solutions that address a particular issue. Frequent reviews of your ECM COE goals reinforce your teams' knowledge of both short- and long-term needs and requirements. Examples of goals for your Center of Excellence include: developing reusable solutions, enabling data and corporate governance compliance programs, and decreasing the time needed to deploy solutions.

#### ✓ **Develop roles and responsibilities**

As with any organization, many players support an ECM Center of Excellence. Take the time to identify the make-up of your team – the roles and responsibilities needed - to plan, design, and deliver ECM business solutions across your enterprise. Your team plan should be both comprehensive and flexible. Many an organization with good intentions has failed because of poor structure. Discuss your staffing plan with partners from both the technical and operational parts of your organization; find out their needs and concerns before making any final decisions on specific roles.

#### **And Remember:**

The structure of your COE goals and teams will determine when and how projects should be undertaken. Both of these need to be clearly defined but flexible enough to change as needed with the business.

### Finally...

The last and perhaps arguably the most important foundational pieces of your ECM Center of Excellence are procedures and measurements.

#### *Best Practices for Building an ECM COE*

- ✓ Get an executive sponsor
- ✓ Identify the necessary players
- ✓ Define your goals
- ✓ Develop roles and responsibilities
- ✓ Define your procedures
- ✓ Develop measurements

#### ✓ **Define your procedures**

COE procedures work in alignment with your goals so your teams have a sound foundation onto which they will build, test and deliver business solutions out to the field. Here again, comprehensive and flexible should remain your watchwords. Your procedures should provide the basis for sound business decisions. When roadblocks occur, your teams need to have immediate options available to them. Strict procedures with no built-in 'what if something goes wrong' plans are almost as useless as no procedures at all. Plan for all scenarios – the good and the bad – so that if the unforeseen happens, your teams will be able to recover quickly.

#### ✓ **Develop measurements**

The only way to know if your Center of Excellence is successful is to measure its performance. What you choose to measure and how you choose to measure it needs to be decided before you begin. Build the necessary criteria into your plans and measuring that criteria will be a simple and easy process. Without proper plans, too much time is spent trying to gather data after-the-fact, which often results in improperly reported numbers and missed Service Level Agreements.

### **And Remember:**

Procedures should be well defined and documented, and readily available to all team members. Don't bury your procedures within poorly named documents, or have them get lost because of poor document version control. One of the first procedures you define should be on how to store and maintain your COE documentation.

## Conclusion

A properly designed ECM Center of Excellence is an extremely important component for any organization that aspires to deliver well-planned, executed, and maintained Enterprise Content Management solutions. It becomes even more important when delivering global solutions. To be successful, the Center of Excellence must be built upon a solid foundation of people, plans and measurements. It requires an organization to define what it wants to achieve and how it wants to achieve it. Plans must be thorough, well defined and documented, and easy to report on.

Most organizations have senior technologists and operational experts who can help plan their Centers of Excellence. Your COE will provide business solutions that range from simple, straightforward solutions involving a limited number of users, to highly complex, multi-technology and multi-user systems. To make sure you uncover, explore, and plan for all of your needs, you may want to augment your in-house skills with resources available through business partners and vendors like IBM who can help you develop a whole-world view of your organization, its technical environment, and inter-operational requirements.

## About IBM ECM Services

For more than a decade, IBM ECM Services has teamed with our customers to successfully implement ECM Centers of Excellence worldwide. Our experts work in partnership with our clients to assist with the practical application of our experience in the client's unique environment.

## About IBM ECM

IBM's Enterprise Content Management software operation enables the world's top companies to make better decisions, faster. As the market leader in content, process and compliance software, IBM ECM delivers a broad set of mission-critical solutions that help solve today's most difficult business challenges: managing unstructured content, optimizing business processes and helping satisfy complex compliance requirements through an integrated information infrastructure. More than 13,000 global companies, organizations and governments rely on IBM ECM to improve performance and remain competitive through innovation.

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