

ECM Initiative Update

Master Contract Status
Vendor Fairs
Educational Outreach &
The Repeatable Process



ECM Acquisition Status (11/17/2015)

- Four successfully completed the Master Contract Negotiations process
- Agencies can begin engaging vendors

Laserfiche
OPEN TEXT
The Content Experts
EMC²
perceptivesoftware
from Lexmark

Bootcamps – ECM Education



Bootcamps – ECM Education



Is there a road map?

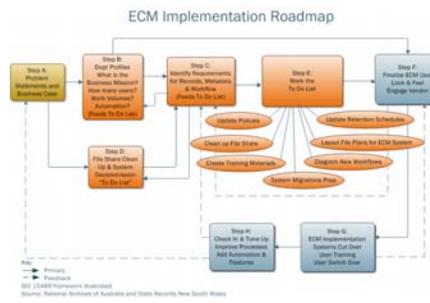
- Yes!!
- ISO 15489 is the best practice road map for implementing a records management program
- Is a stable, repeatable process
- Used on an international level

How does it help me?

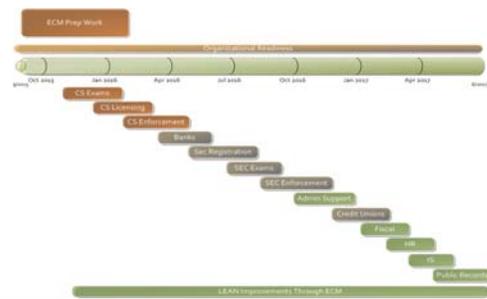
Makes you an informed customer with your contractor

- Walks you through the process
- Gives you specific tasks to do at each step
- Tells you what to do with the information collected at the last step

The Roadmap as Outcomes



Repeatable Process



Repeatable Process

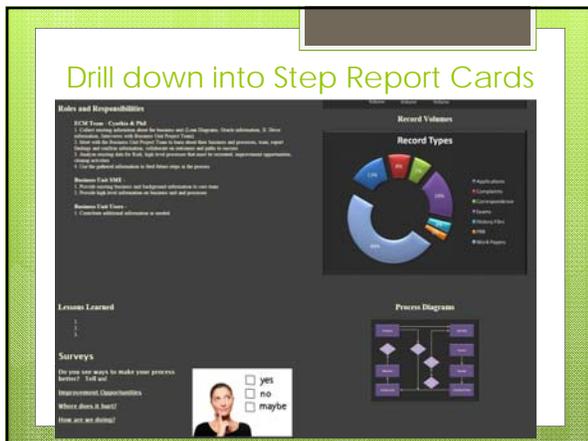
- ECM Project Dashboard
- Tracks where each business unit is in the process
 - Progress
 - Risk areas that require attention



Drill down into Step Report Cards



Drill down into Step Report Cards



Repeatable Process

- Make the steps visible and easy to follow

Deliverables

Roles and Responsibilities

ECM Team - Cynthia & Phil

1. Collect existing information about the business unit (Lean Diagrams, Oracle information, X, Drive information, Interviews with Business Unit Project Team)
2. Meet with the Business Unit Project Team to learn about their business and processes, train, report findings and confirm information, collaborate on outcomes and paths to success
3. Analyze existing data for Risk, high level processes that must be recreated, improvement opportunities, cleanup activities
4. Use the gathered information to feed future steps in the process

Business Unit SME -

1. Provide existing business unit background information to core team
2. Provide high level information on business unit and processes

Business Unit Users -

1. Contribute additional information as needed

Reactions to This Approach

- "This makes sense...we can do this!"
- Easy to see themselves in the process and success
- Takes the mystery out of migrating to ECM
- Feedback is overwhelmingly positive

Questions?
