

About Enterprise Content Management (ECM)

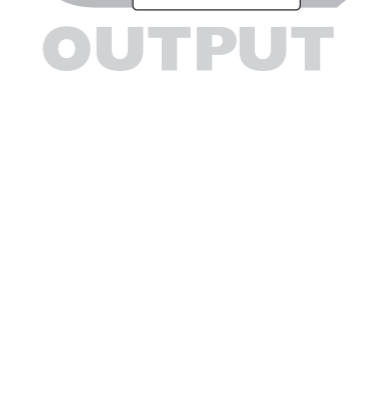
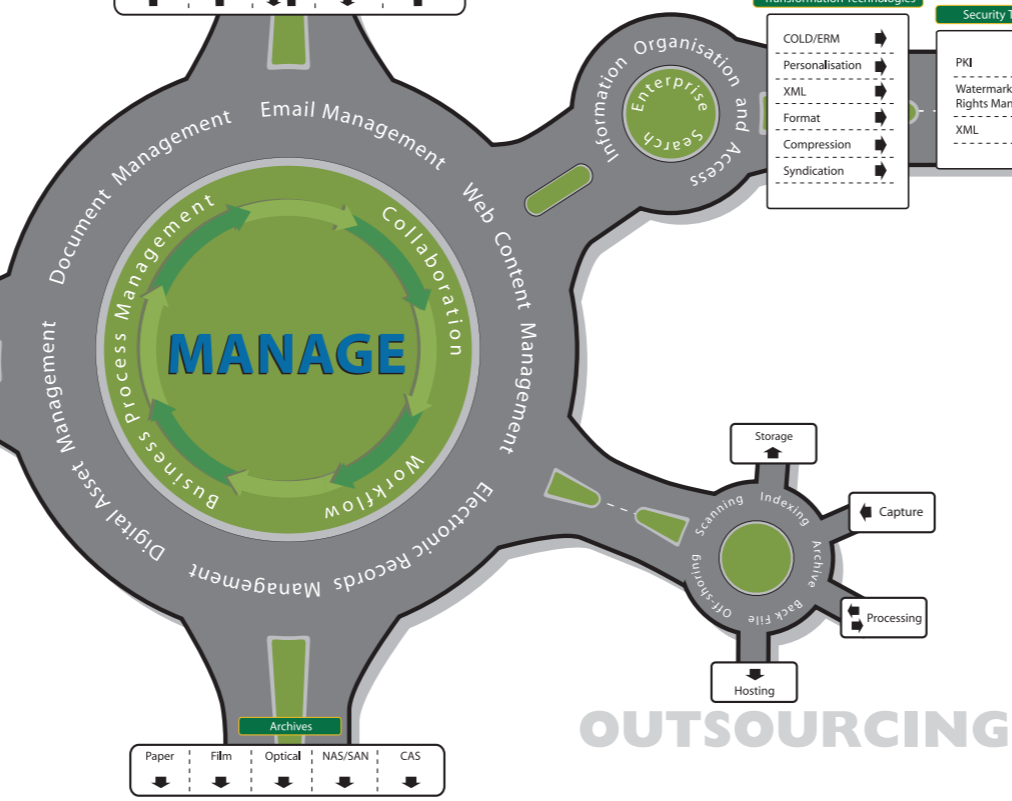
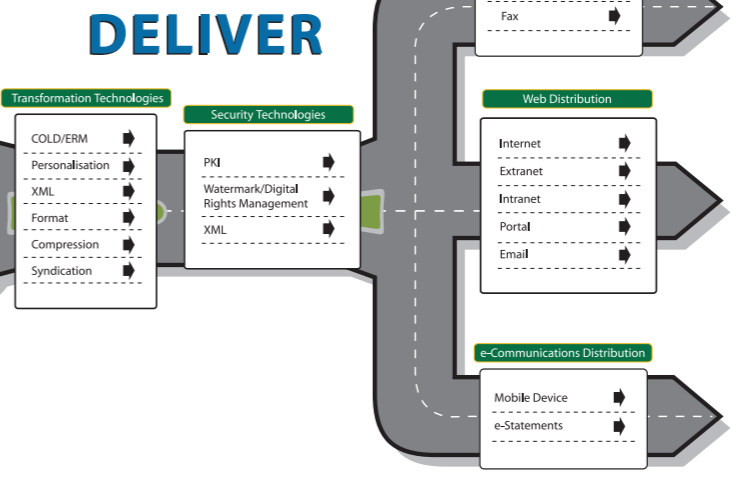
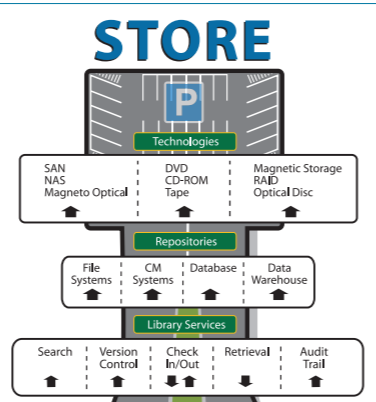
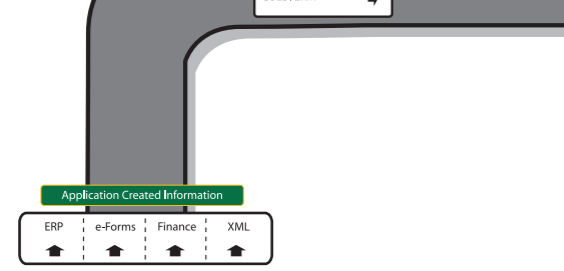
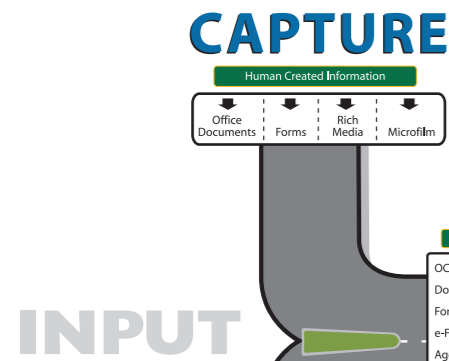
Managing your unstructured content is a challenge. Which records do you keep to comply with regulations and for how long? What's the best way to manage the content on your website? What's the best storage medium for your content? How do you find the right content when you need it? How do you create - and automate if possible - processes that enable your company to increase efficiency.

Enterprise Content Management (ECM) is the term used to describe the technologies, tools, and methods used to capture, manage, store, preserve, and deliver "content" or "information" across an enterprise or organisation. At the most basic level, ECM tools and strategies allow the management of an organisation's unstructured information, wherever that information exists. Unstructured information means letters, emails, reports etc as opposed to databases or accounting systems which contain "structured" information.

Numerous terms are used, but regardless of the precise terminology, ECM capabilities manage traditional content types (images, office documents, graphics, drawings, and print streams) as well as the new electronic objects (web pages and content, email, video, and rich media assets) throughout the lifecycle of that content.

As with any technology, the most important thing isn't how you define it or categorise it, but successfully applying the technology to your particular business processes. The technologies included in this Roadmap will enable you to manage your content at the various stages of that content's lifecycle. Implementing all of these technologies together will allow you to manage content throughout its complete lifecycle - from creation to either long-term preservation or deletion.

However, Enterprise Content Management isn't about technology. ECM means being able to get control of your business processes. It means improved efficiency and reduced cost. It also means you can satisfy statutory and regulatory compliance requirements and be in effective control of your business. In the end it boils down to improved financial performance and genuine competitive differentiation.



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- online, classroom and in-house training classes

Improve your organisation's adherence to best practice, and your own performance, whilst building your professional qualifications. The AIIM Certificate courses have been developed specifically for AIIM in conjunction with our Education Panel of international industry experts.

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Enterprise Content Management (ECM)

This course is designed from global best practices among our 50,000 members. The Enterprise Content Management qualification covers the full spectrum of ECM applications and is ideal for project managers, consultants and implementation team members. It covers requirements planning, ROI calculation and change management.

Electronic Records Management (ERM)

This course explores records management in relation to the business needs of all types of organisations, both in the public and private sector, embracing all records, but with a particular emphasis on electronic records. ECM is particularly useful for IT staff needing a more detailed knowledge of records management and for traditional records managers needing to update.

Business Process Management (BPM)

This course programme covers the practice of BPM, the role of ECM in BPM, business analysis, process improvement, flowcharting, process modelling, BPM approaches, BPM technologies, and collaboration, along with the business case and implementation strategies.

Information Organisation and Access (IOA)

Uniquely positioned to cover best practice in these new technologies, the course covers concepts and technologies for enterprise search, content classification, categorisation and clustering, fact and entity extraction, taxonomy creation and management, and information presentation.

For further information visit: www.aiim.org/training

Probing Questions

ECM is both strategy and technology, and though implementations will have some common elements, each application of the technology will differ according to a company's business needs. Below are a few questions to consider, and to ask of potential solution providers, as you go about creating your own ECM strategy.

- In what way are you an "Enterprise" solution? Can you handle a large number of users? What is your largest installation?
- How do you address records management? What are the things I should do to ensure a successful compliance/RM program?
- What differentiates you from your competitors?
- This industry is consolidating. Where will it be in a year and where will your company be in three years?
- Does your product support industry standards? Which one?
- How does your solution manage integration with other line-of-business applications in an organisation (e.g. ERP, CRM)?
- Does your company focus on a particular vertical market or markets?
- Which pieces of the ECM technology pie does your solution address?
- Should we consider outsourcing? Why or why not?

For additional information visit: www.aiim.org.uk

Glossary

Capture

Aggregation - The process of combining data inputs from different creation and authoring tools and other systems.

Categorisation - Organising documents, web pages, and other content into logical groupings, based on their contents.

COLD/ERM (Computer Output to Laser Disk/Enterprise Report Management) - Captures, stores and indexes computer output (reports primarily) on storage media. Once stored the reports can then be retrieved, viewed, printed, faxed, or otherwise distributed.

Document Imaging - The process of capturing, storing, and retrieving documents regardless of the original format, using micrographics and/or electronic imaging (scanning, OCR, ICR, etc.).

E-Forms/Web Forms - Forms designed, managed, and processed completely in an electronic environment.

Forms Processing - The ability for software to accept scanned forms and extract data from the boxes and lines to populate databases.

Intelligent Document Recognition (IDR) - Automatically identifies document types from the layout and structure of the document.

HCR (HandPrint Character Recognition) - HCR technology is designed to turn images of handprinted characters into ASCII code.

ICR (Intelligent Character Recognition) - Advanced OCR technology that may include capabilities such as learning fonts during processing, using context to strengthen probabilities of correct recognition or recognise handprint characters.

Indexing - Identification of specific attributes of a document or database record to facilitate retrieval.

Input Designs - Templates designed to enable authors to easily enter content into a customised system, based on the type and format of content to be entered.

OCR (Optical Character Recognition) - A technique by which images of characters can be machine-identified and then converted into editable and searchable text.

OMR (Optical Mark Recognition) - Detects the presence, or absence, of marks in defined areas (e.g. tick box), used for processing questionnaires, standardised tests, etc.

XML (eXtensible Markup Language) - An established standard, based on Standard Generalised Markup Language (SGML), designed to facilitate document construction from standard data items. Also used as a generic data exchange mechanism.

Store

Audit Trails - A log of who changed what and when for accountability.

Check In/Out - Ensures only one person can work on a document at any time.

Content Management System - The capability to manage and track the location of, and relationships among, content within a repository.

Data Warehouse - A large central repository for an organisation's structured data, allowing access to it for retrieval and reporting.

Database - (1) Electronic collection of records stored in a central file, accessible by many users for many applications. (2) A collection of data elements within records or files. Relational databases are most common - data is stored in standard rows, tables, and columns.

DVD (Digital Versatile Disc) - 120mm optical disc on which digital video, audio, data, & images can be stored. Available in read-only, recordable, and re-writable formats.

File System - The way files are named and placed logically for storage & retrieval, most commonly in a hierarchical (tree) structure.

Magneto Optical (MO) - Recording data using a combination of magnetic and optical means to change the polarity of a magnetic field in the recording medium. Data is erasable and/or re-writable.

Magnetic Storage - Predominantly hard disk drives and tapes.

NAS (Network Attached Storage) - Hard disk storage directly attached to the network rather than through a computer.

Optical Disc - A medium that accepts and retains information in the form of marks or density modulation in a recording layer that can be read with an optical beam.

RAID (Redundant Array of Independent Disks) - Storing the same data on multiple hard disks for improved performance and fault tolerance.

Records Management - Enables an enterprise to assign a specific lifecycle to individual pieces of corporate information from creation, receipt, maintenance, and use to the ultimate disposition of records. A record is essential for the business; they hold evidentiary value of either a business decision or are kept for compliance reasons. A record has strict rules associated with it and is mainly kept in a separate repository from normal working documents.

Web Content Management - A technology that addresses the content creation, review, approval, and publishing of web-based content, combining it with styles and templates.

Workflow - Automation of business processes, in whole or in part, where

Manage

documents, information, or tasks are passed from one participant to another for action, according to a set of rules.

BPM (Business Process Management) - A business process is a logically related set of workflows, worksteps, and tasks that provide a product or service to customers. BPM is also about changing processes according to a methodology.

Digital Asset Management - Digital asset management allows an enterprise to digitise, log, store, manage, track and distribute high volumes of rich media through multiple channels, such as video, audio and images.

Management - Surveys undertaken by AIIM suggest that "technology" is not the issue that challenges users tackling ECM deployments. The issues which users most frequently cite as their biggest challenges are "releasing the scope of change", "underestimating the necessary changes", "enforcing the change" and "securing employee commitment". Success in the use of ECM technology in your organisation is therefore not dependent on using the right technologies. It is about people, process and project management. Key to getting these issues right involves having a proper understanding of the business processes you are automating.

Collaboration - Tools (collaborative whiteboards, etc.) that allow multiple users to work on the same content in a common environment.

Document Management - Software that controls and organises documents throughout an enterprise. Incorporates document and content capture, workflow, document repositories, output systems, and information retrieval systems.

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Preserve

Microfilm - (1) Fine-grain, high-resolution film used to record images reduced in size from the original. (2) Microform which comes in the shape of a strip or roll. (3) To record microphotographs on film.

Optical Disc - Primarily WORM (Write-Once, Read-Many). An optical disc on which data is recorded by the user once (and is unalterable) and can be read many times.

Paper - Still the most prolific form of holding information. Although modern papers are not suitable for long term preservation, with microfilm, one of two ways to ensure that documents are readable 100 years from now, or longer.

SAN/NAS and CAS (Content Addressed Storage) - Are all increasingly used for archiving content. CAS is a storage methodology designed for rapid access to fixed content.

Standards - There are a range of International Standards available to support implementation strategies. Full details of these are available on the AIIM website www.aiim.org/standards

Scanning, Microfilm, Records Management and Storage. There is also Best Practice guidance available. The British Standards Institute publishes a number of Best Practice Guides and there is also guidance available from The UK National Archives. The "Model Requirements for Electronic Document and Records Management Systems (MoreQ2)" also offers useful guidance, as well as a number of ISO standards.

Long-Term Formats - PDF-A is an open ISO standard which describes a format which has been specifically developed for the long-term preservation of electronically generated documents. PDF-E has additional extensions for Engineering documents and drawings.

Email - Increasingly, electronic information is forming part of the information assets in organisations. Research by AIIM and others shows that many organisations are not yet capturing all relevant information in an organised fashion. It is now estimated that more than 70% of business communication is by email and effective management of email should be an integral part of any preservation activity.

Standards exist covering areas like

Deliver

COLD/ERM - Computer Output to Laser Disc/Electronic Report Management.

Compression - Software or hardware process that "shrinks" a digital file to a lower number of bits for storage or transmission. Examples of compression techniques are ITU-TSS (CGIT) Group 3 & 4, LZW and JPEG.

Digital Rights Management - Enables secure distribution and control over paid content over the web.

Digital Signature - Electronic signature that can be used to authenticate the sender of a message.

Format - File formats that are commonly used include ISO Latin-1 or Pure Text, TIFF, PDF, GIF and JPG and many others. The different file formats may use a variety of compression techniques.

Personalisation - Matching content and the way it is presented to the individual user.

PKI (Public Key Infrastructure) - Secure exchange using public and private keys obtained through a trusted authority.

Syndication - Supply of content for re-use and integration with other materials through the use of feeds.

Transformation - Changing content from one format to another. This is closely linked to delivery, as the delivery channel decides what is the required format.

XML - An established standard, based on the Standard Generalised Markup Language (SGML), designed to facilitate document construction from standard data items. Also used as a generic data exchange mechanism. XML now forms the basis of a number of agreed protocols and schema which have been developed through consensus within and between different industry and corporate sectors - www.w3.org, www.xml.org, www.ibm.com, www.oasis.org are all good sources of information on XML, which is a broad topic in its own right.

Enterprise Search - Enterprise Search is a technology designed for searching across multiple repositories and collate and present the results under a single interface. For Enterprise Search like any search to work properly, it needs to be accompanied by a good content classification system and needs to respect the individual access rights in the separate repositories it searches.

Outsourcing

Outsourcing is the delegation to experts outside the organisation of non-essential or non-core business activities. Many of the activities that may be part of an ECM operations strategy, and that can be found on this Roadmap, may not be considered part of the organisation's core processes and so are candidates for a move to external service providers. The electronic nature of ECM activities allows for geographical distribution of tasks, including off-shoring to other countries where labour costs may be cheaper.

Reasons for outsourcing include:

- Cost:** Using an external service provider the staffing costs and associated overheads may be reduced.
- Capacity:** Peaks and troughs in activity may be more efficiently dealt with by external suppliers.
- Quality:** Expected quality from a specialist supplier can be expected to be better than in-house, and will be monitored through service-level agreements (SLAs).
- Knowledge:** There is not enough knowledge in-house to either fulfil the requirements or expand certain processes.

Examples of outsourcing:

- Capture:** Scanning and capturing of information through the use of scanning bureaus. Applications include invoice processing and mail handling via electronic mailrooms. Data-entry processing into core legacy applications from scanned paper forms may be outsourced or off-shored using network links. Back-file conversion of existing paper documents at the start of ECM projects is frequently outsourced.
- Processing:** Document-centric business processes may be outsourced, including accounts payable, claims processing and call-centre applications.
- Hosting:** Software as a Service (SaaS) and hosting of core business applications by an external company involves renting out access to core software applications or on-demand functions. Hosted storage may be provided by service-providers run by specialised companies.
- Storage:** Specialists in long-term preservation provide storage of either physical (paper) files or electronic data in large warehouses with specially controlled environments.

As Enterprise Content Management is about more than just technology, every decision to outsource parts of the process has to be carefully weighed both on the financial and technology side, but also on the strategy side. As important as the selection of any in-house systems, outsourcing needs to fall under the same stringent guidelines and seamlessly fit into the overall strategy.

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Based on workflow technologies and designed to meet the operational and regulatory requirements of local authorities, Civica's EDM and EDPM systems automate business processes - capturing, declaring and retrieving documentation/records within a corporate file plan. Authorities can consequently respond faster to citizens, share information at a departmental and corporate level and benefit from increased productivity and complete service delivery.

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Cygnets is a specialist supplier of electronic document, records, email and content management solutions with particular focus on SME businesses. Cygnets ECM offers a fully functional browser-based system incorporating capture, archival and workflow as well as online creation, editing and retrieval. A sophisticated rules-based system ensures corporate data security and compliance.

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Since 1989, the Berlin-based SAPERION has been developing software solutions for Enterprise Content Management (ECM) systems, that bring archiving, document management and workflow functionality together in one system. SAPERION has subsidiaries in Great Britain, North America, Switzerland and Singapore. SAPERION is a market leader in key categories, such as general integration capabilities, web functionality, integrated workflow capabilities, e-Mail Archiving and Document Capture.

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Serco Consulting is one of the UK's leading consultancy and professional services providers. Now incorporating Cornwell Management. Consultants, we are thought leaders and expert practitioners in Electronic Document Management and Records Management. We are part of Serco, the international service company which transforms, manages and operates a wide range of public and private sector services.

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Venture is an information management services and consulting company. We work with organisations who have challenges accessing, trusting or assuring information crucial to making business decisions. We improve information handling and processing so that companies gain increased confidence in, and access to, information which helps improve performance and achieve business goals.

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The Content Group is the one stop source for the provision of integrated Enterprise Content Management (ECM) Solutions that enable organisations to gain competitive advantage, improve operational efficiency, ensure compliance and reduce risk. By partnering with the market leading software providers, combined with unparalleled ECM expertise, The Content Group delivers to organisations the most comprehensive end to end ECM Solutions.

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EDM Group is a leading provider of electronic document management services and solutions across all UK sectors. With over 30 years experience, EDM Group delivers proven business benefits from a comprehensive portfolio of EDRM solutions covering the entire document lifecycle.

Uniquely combining high volume document digitisation and hosting services with specialised software development and integration skills, EDM Group offers its customers the options of outsourced services, in-house EDRM implementations or hybrid combinations. EDM Group's solutions are scalable to meet the needs of a department or an enterprise and are designed and developed by our own specialists, ensuring that customers' requirements are completely met. Visit www.thedmggroup.co.uk or call 0800 731 4911 for more information.

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Documentum software from EMC Corporation includes enterprise content management solutions that enable organisations to unite teams, content and associated business processes. With a single platform, EMC Documentum software enables people to collaboratively create, manage, deliver and archive the content that drives business operations, from documents and discussions to e-mail, web pages, records, and rich media. With Documentum enterprise content management, organisations improve their competitive advantage by accelerating time to market, increasing customer satisfaction, and reducing operating costs.

For more information, visit www.emc.com.

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Hyland Software Inc. is the developer of OnBase, a rapidly deployable suite of enterprise content management (ECM) software applications. OnBase is a modular suite of ECM applications that includes document imaging, workflow, electronic document management, COLD/ERM and records management. OnBase allows organisations to manage all digital content, including scanned paper documents, e-mails, faxes, print streams, application files, e-forms, web content and multimedia files. OnBase is used by businesses and government agencies around the world to reduce the time and cost of performing important business functions and address the need for regulatory compliance through the management, control and sharing of digital content with employees, business partners, customers and other constituencies.

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IBM ECM helps companies make better decisions faster by managing content, optimising associated business processes and enabling compliance through an integrated information infrastructure:

- By enabling companies to integrate content with processes to add value and transform their business.
- By streamlining and optimising complex processes to improve the flow of work throughout the global enterprise.
- By delivering an integrated, open platform that can be globally deployed and that provides interoperability with the widest selection of IT systems, thereby reducing costs and improving efficiency.

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Fujitsu Europe Ltd offers the most comprehensive range of document scanners available on the market today offering the ability to scan paper sizes from business card to A3, scan in speeds from 10 to 200 images per minute, single and double sided scanning of colour, grayscale or black and white documents, and image enhancement of poor quality or mixed colour documents through a range of software add-ons and impressive functionalities.

Whether your application involves document management, archiving, workflow or forms processing, Fujitsu most likely has the optimum scanner for the capture of your documents and data.

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Workshare, an information security company, delivers Secure Content Compliance solutions to over 6,000 organisations worldwide. Workshare solutions uniquely combine policy enforcement, management control and user entitlement to ensure safe information exchange without business disruption. Its products include Workshare Protect, Workshare Professional, Compare Service and TRACE! Workshare's customer base spans small to large organisations in every industry segment and includes more than 60 percent of the Fortune 1000 and 85 percent of the ProServices 250.

Over one million professionals in 65 countries use Workshare software. Workshare is the sponsor of www.metadatatarisk.org, the definitive source for content security. For more information, visit www.workshare.com.

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AIIM - The global enterprise content management association

AIIM Membership

There's good reason why leading ECM professionals and suppliers join AIIM. It's because we are leading the way to the understanding, adoption and use of information management technologies.

Whether you are a user or supplier of content management solutions, AIIM has a membership designed for you and your organisation:

- Professional Membership**
 If you are an ECM end-user or consultant, why not become an AIIM Professional Member. Keep yourself up to date with the issues and practices of enterprise content management. Benefits include discounts for training courses and events, a regular AIIM magazine, networking opportunities and access to member-only resources that focus on enhancing the knowledge of industry professionals.
- Trade Membership**
 As a supplier, why not enrol your organisation as an AIIM Trade Member. This membership allows you to leverage your marketing spend, gaining enormous visibility for the products and services you provide. Our regular member meetings will keep you and your colleagues up to date on industry issues and to have your say in the ongoing efforts of AIIM to promote the ECM industry.

You can join the AIIM Associate Member community for free by registering at: www.aiim.org.uk/membership
 For more information please contact AIIM Europe on +44 (0) 1905 727600.

The Business Case for ECM

In most organisations there is a business case for ECM. Developing it can be time consuming but it's a worthwhile exercise as you will learn a great deal about the business and your processes as you do it.

The trouble with ECM is that the wider benefits are often so profound they are difficult to estimate and put a value against. The scope for radical improvement in process efficiency is almost always underestimated.

Your business case serves several purposes. Obviously it's about showing there is a financial benefit from implementation but there is more to it than that. The business case is a way to get senior management to commit to changing the organisation and moving it towards its strategic vision. It's also a way of communicating the post ECM vision to all the staff and the other stakeholders in the organisation.

You need to start with the fundamental "business drivers". Look at the overall business strategy and review how dependent it is on information flows, identifying the flows and their dependencies on information can lead to dramatic improvement in those information flows which in turn will yield significant strategic benefits.

In simple terms you have to demonstrate that the value of the "Total Benefits" to the organisation exceed the "Total Costs" with a level of risk that is acceptable. This means you need to be able to quantify both the hard benefits and the soft benefits. The hard benefits lead to real cost savings and performance improvements. The soft ones are more difficult to quantify but still need to be estimated and evidenced.

The key to this work is a process model that involves mapping the key business processes and understanding what goes on now. It is important that the processes are measured and

costed so that you have a benchmark to evidence performance improvement downstream.

Bear in mind there are outsourcing options in an ECM scenario so don't think you necessarily have to do it all internally.

Benefits can usually be divided into three categories:

Productivity benefits - which come directly from lower costs or increased revenues and which show up on the profit and loss account.

Service benefits - are where process times are improved and quality is enhanced but there is not necessarily a direct, measurable impact on the profit and loss account.

Strategic benefits - are those which come from the organisation meeting it's strategic goals like increasing market share. It is wise to value only the first two of these in your business case and to articulate the last category but not build it into your financial assumptions. Those benefits will then be seen as the icing on the cake rather than ones on which the "case" is dependent.

As your business case evolves you will begin to see the scope for improvement in your organisation. This revelation is immensely rewarding as it opens up a vision of how you can move forward. The biggest challenge will likely not be in the numbers but in the need to communicate the vision to the board, the senior management and all your colleagues.

AIIM is the international enterprise content management association and we have events, tools and education programmes to help you with your ECM project.

Visit www.aiim.org.uk for further information.



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AIIM represents the community of users and suppliers who deploy technology to capture, manage, store, preserve and deliver information in support of business processes. Our repertoire of events and resources lead into our professional development programmes and the opportunity for executive networking through membership. Our industry advocacy provides for effective representation of ECM in both the public sector; the private sector and with governments and standards bodies on an international scale.

Visit www.aiim.org.uk for:

- Online ECM rundown
- Education Programmes
- Case Studies
- User Research
- White papers
- Events

aiim ECM Roadmap



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Numerous terms are used, but regardless of the precise terminology, ECM capabilities manage traditional content types (images, office documents, graphics, drawings, and print streams) as well as the new electronic objects (web pages and content, email, video, and rich media assets) throughout the lifecycle of that content.

As with any technology, the most important thing is not how you define it or categorise it, but successfully applying the technology to your particular business processes. The technologies included in this Roadmap will enable you to manage your content at the various stages of that content's lifecycle. Implementing all of these technologies together will allow you to manage content throughout its complete lifecycle - from creation to either long-term preservation or deletion.

However, Enterprise Content Management isn't about technology, ECM means being able to get control of your business processes. It means improved efficiency and reduced cost. It also means you can satisfy statutory and regulatory compliance requirements and be in effective control of your business. In the end it boils down to improved financial performance and genuine competitive differentiation.

AIIM Certificate Training Programmes

Enterprise Content Management (ECM)
 This course is designed from global best practices among our 50,000 members. The Enterprise Content Management qualification covers the full spectrum of ECM applications and is ideal for project managers, consultants and implementation team members. It covers requirements planning, ROI calculation and change management.

Electronic Records Management (ERM)
 This course explores records management in relation to the business needs of all types of organisations, both in the public and private sector, embracing all records, but with a particular emphasis on electronic records. It is particularly useful for IT staff needing a more detailed knowledge of records management and for traditional records managers needing to update.

Business Process Management (BPM)
 This course programme covers the practice of BPM, role of ECM in BPM, business analysis, process improvement, flowcharting, process modelling, BPM approaches, BPM technologies, and Collaboration, along with the business case and implementation strategies.

Information Organisation and Access (IOA)
 Uniquely positioned to cover best practice in these new technologies, the course covers concepts and technologies for enterprise search, content classification, categorisation and clustering, fact and entity extraction, taxonomy creation and management, and information presentation.

Online, classroom and in-house training classes

Improve your organisation's adherence to best practice, and your own performance, whilst building your professional qualifications. The AIIM Certificate courses have been developed specifically for AIIM in conjunction with our Education Panel of international industry experts.

The Practitioner and Specialist levels can be taken as online modules. The Master level is a 4-day classroom course plus an assessed case study exercise.

