

# Enterprise Content Management (ECM) solution checklist



## Introduction

You know why you're here. Staff are tired of dealing with paper-based approvals and workflows, just because "that's the way it's always been done". Now, filing cabinets are overflowing, or your online and offline files are just too hard to find.

Think about document management at your organisation. Are employees:

- Inputting data manually?
- Storing files in multiple locations, both physically and digitally?
- Spending time searching for the information they need?
- Physically walking documents from one part of the office to another in order to action the next part of the workflow, such as, for example, getting an authorising signature?
- Double-handling documents?

While each of these activities might not take up much time individually, collectively and spread across the business, this quickly adds up to hundreds of hours that could otherwise have been spent on revenue-generating activity.

An Enterprise Content Management (ECM) solution can work to streamline document workflows, because it:

- Eliminates the need to manually input data;
- Stores and tags all documents stored in a central location, avoiding needless duplication;
- Has a simple yet powerful search function, so users can quickly find the information they need; and,
- Digitises and automates businesses processes, thereby optimising workflows, eliminating double-handling and physical transport requirements.

## How to find the right ECM for your needs

An ECM isn't a system that you can choose on the fly - it will affect the way documents are managed right across your organisation, so it's going to change the way people work.

This is why, before you start going to market to look for an ECM solution, you should understand what this involves.

Welcome to the ECM Checklist - your complete guide to finding the right ECM solution for your business. Read on to discover how to:

- Define your organisation's needs.
- Discover what other ECM solution similar businesses are using.
- Review online sources to assess fit and quality of available solutions.
- Prepare thoroughly for product demonstrations, leaving no stone unturned.
- Shortlist and compare your vendors' functionality accurately.
- Provide the right information to get accurate quotes so you can make your final business decision.

We hope you find this checklist helpful.

## Chapter 1: Define your organisation's needs

Instead of thinking of an ECM solution as purely a document storage and findability solution, think of it as a way to manage documents throughout their entire workflow cycle - from creation to disposal.

Security is another factor, as having an ECM solution will help you to protect sensitive data, ensuring that the right people have access to the right data at the right time.

This way, you'll be more readily able to identify business processes that can be supported by your ECM solution, and therefore be in the running to find the right solution.

Positive ROI can be found when you can use the same ECM solution across departments and workflows in the organisation, from accounts payable, right through to HR onboarding and management.

## What core ECM capabilities do you need?

FUNCTION (TICK IF REQUIRED)	
<b>DOCUMENT MANAGEMENT</b>	
Fast	<input type="checkbox"/>
Content analytics	<input type="checkbox"/>
Manage content coming from transactional systems	<input type="checkbox"/>
Link documents from other enterprise apps	<input type="checkbox"/>
<b>SEARCH FUNCTIONS</b>	
Full-text search	<input type="checkbox"/>
Support for common search syntax	<input type="checkbox"/>
Filtered search results for end-users to quickly find what they have access to	<input type="checkbox"/>
Metadata search (advanced)	<input type="checkbox"/>
Custom search forms (advanced)	<input type="checkbox"/>

<b>VERSIONING</b>	
Automatic tracking and storage of file versions	<input type="checkbox"/>
Audit trails	<input type="checkbox"/>
Archiving capability	<input type="checkbox"/>
Revert to previous versions	<input type="checkbox"/>
<b>FORMATS</b>	
Ability to generate different formats e.g. PDF, PNG, XML etc...	<input type="checkbox"/>
<b>METADATA / CLASSIFICATION</b>	
Ability to support certain standards that your organisation must adhere to. E.g. Data Documentation Initiative (DDI) etc... List here: a. b. c.	<input type="checkbox"/>
Search by author, date published, keywords, topic and more.	<input type="checkbox"/>
<b>SECURITY</b>	
Need to meet compliance mandates? List here: a. b. c.	<input type="checkbox"/>

Includes data encryption and restrictions on database access	<input type="checkbox"/>
Vendor performs frequent tests and security audits	<input type="checkbox"/>
Enterprise-grade data centre storage	<input type="checkbox"/>
Can define and apply access control as needed by user group, department and organisation-wide.	<input type="checkbox"/>
<b>SCALABILITY</b>	
<p>Scale to support. [Tick and specify]:</p> <p><input type="radio"/> 1000+ users</p> <p><input type="radio"/> 1000 users</p> <p><input type="radio"/> 500 users</p> <p><input type="radio"/> 100 users</p> <p><input type="radio"/> 50 users</p>	<input type="checkbox"/>
Scale to support high volumes of documents and workflows	<input type="checkbox"/>
Support for multiple databases, integrations and data exchanges between other on-premise and cloud applications and your ECM solution while sustaining stability of entire IT ecosystem.	<input type="checkbox"/>
<b>MOBILITY</b>	
<p>Accessible by a wide variety of mobile devices [list specifics if required]</p> <p>a.</p> <p>b.</p> <p>c.</p>	<input type="checkbox"/>

Options for device access restrictions on sensitive data	<input type="checkbox"/>
Provides content access within common desktop and mobile applications, such as: [List] a. b. c.	<input type="checkbox"/>
<b>AUTOMATED CAPTURE AND IMAGE PROCESSING</b>	
Automate paper-based processes (e.g. accounts payable)	<input type="checkbox"/>
Support centralised scanning	<input type="checkbox"/>
Form recognition, classification and storage (apply metadata)	<input type="checkbox"/>
Integration into business workflows	<input type="checkbox"/>
Options for mobile scanning	<input type="checkbox"/>
<b>INTEGRATION / INTEROPERABILITY</b>	
APIs or out of the box connectors to interface with other enterprise applications. List specific apps: a. b. c.	<input type="checkbox"/>
Interoperability with other ECMs	<input type="checkbox"/>

Information can be captured from range of different sources, and in a range of different formats	<input type="checkbox"/>
All-in-one ECM or a modular system? Specify:	<input type="checkbox"/>
<b>Installation Duties</b> <input type="radio"/> a. Cloud <input type="radio"/> b. On-premise <input type="radio"/> c. Hybrid	<input type="checkbox"/>

## Chapter 2: Discover what other ECM solution similar businesses are using

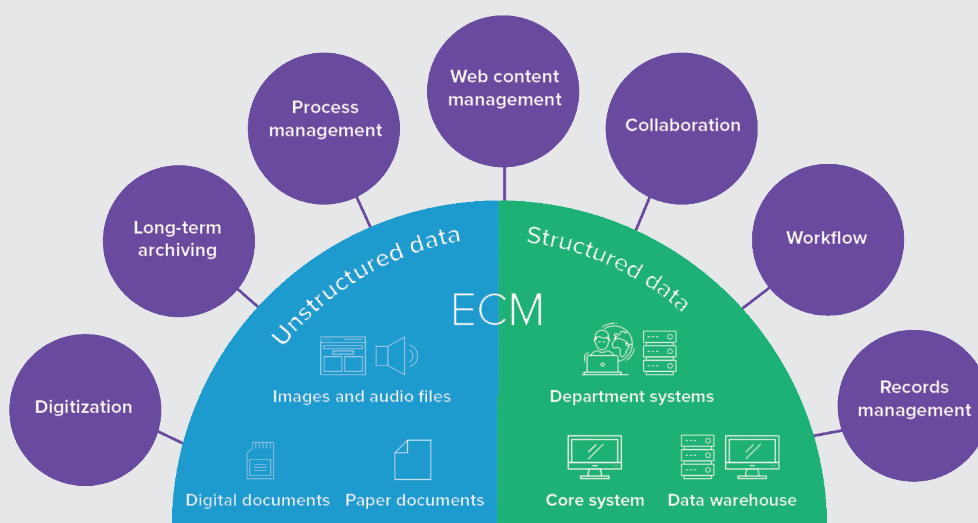
Do research on what ECM solution similar businesses are using. If there are a few businesses using the same ECM solution, then it would be a good idea to look into the ECM solution vendor.

## Chapter 3: Review online sources to assess fit and quality of available solutions

There is a wealth of credible online data that will help you to evaluate vendors in different ways. You may choose to:

- Review marketing collateral, case studies, how-to videos, and client lists from vendor sites.
- Take a look at online reviews of the product itself, but also of vendors' implementation, support and service functions.
- Use comparison charts as a helpful way to narrow down your search based on functionality.

Online research will help you validate what you find out from industry peers, and compile a list of questions to ask each vendor when you are ready to speak to them.



## Chapter 4: Request a demo

Seeing is believing - which is why demos are an imperative part of the selection process. Preparedness in this phase will help you to get a demo that is tailored to your environment and needs. This will also assist in buy-in, as you'll invite the key stakeholders involved in this decision, implementation and ongoing adoption and use.

You'll want to ensure that:

- Live demos involve employees across all of the departments that typically touch any given document.
- A demo can involve some participation, for example, an employee can follow simple instructions to complete a task in the system with ease, with minimal training and demonstration.
- You live-test a few functions that will prove ease-of-use when it comes to performing your business-critical tasks within the system.

This will help to make sure that your ECM is covering all the possible requirements across the organisation.

## Chapter 5: Shortlist vendors

By this stage, you're likely ready to shortlist two or three vendors from your list of targets. Whatever your critical requirements are, your shortlisted vendors will deliver on these.

You'll be sure the products all meet your functional needs, service and support has a good reputation, the product is easy enough to use and adopt, security is enterprise-grade, and integration is up to industry standard.

Before you start comparing prices, however, you might want to do the following:

- Hold reference conversations with decision-makers in other similar organisations (be sure to ask about the unexpected costs or impacts during their project - so you don't make the same mistakes!)
- Take a close look at implementation and consulting services and their costs.
- Review comparative service response times.
- Identify the support programs that will be closest suited to your needs.
- Understand the change request process and cost implications for each vendor.
- Do a review of the system and hardware/software required from both an investment and a compatibility standpoint.
- Check the financial viability of the vendor.
- Understand the payment terms.
- Review whether the product you're looking at is in the core business area of the vendor.

Once you've completed these checks, it is likely you'll see one vendor leads the fray in terms of suitability. But how much will it cost you, and how quickly can the system be implemented?

## Chapter 6: Give information for quoting and comparing systems

This brings you to the quoting stage. Vendors will all have different cost and quoting structures, making it difficult to compare products directly. There are initial set-up costs, ongoing charges, sometimes a per-user charge - not to mention technical support fees and update charges. Some may be all-in-one pricing models while others are modular in their pricing, which can additionally make it hard to compare.

Don't just rely on the quotes without understanding every line or possible charge, and this is a very good stage to get strong at your questioning. For any cost that can't be specifically quoted until a later stage, ask for ranges for similar sizes of organisations. Or even better, set up a pricing table that includes, for your basic business critical functions:

- Installation costs.
- Annual / ongoing license fees for X number of users.
- Annual support packages.

This way you can compare apples with apples.

Choosing the right ECM solution for your business is not an easy task - but we hope our ECM Checklist made it just that little bit easier.

### KYOCERA Document Solutions South Africa

90 Bekker Road | Hertford Office Park | Vorna Valley | Midrand  
Tel +27 (011) 595 2600  
[www.kyoceradocumentsolutions.co.za](http://www.kyoceradocumentsolutions.co.za)  
[info@dza.kyocera.com](mailto:info@dza.kyocera.com)



[kyoceradocumentsolutions.co.za](http://kyoceradocumentsolutions.co.za)