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by Hyland

Two Inconvenient Truths IT Needs to Know Before Selecting an ECM Solution

Executive Summary

Over the last ten years or so, IT has been acquiescing software buying decisions to business units to combat a reputation of "complex," "costly" or "slow" software implementations. However, these "safe" decisions have resulted in systems that are inexpensive to buy but costly and difficult for IT to own. Instead of improving relationships, they've only served to perpetuate IT's poor reputation.

IT is now looking to provide unique and helpful insight into the buying process so they become a strategic business partner that is essential to vetting technology options.

In the enterprise content management (ECM) market, the IT role is especially important because ECM handles mission-critical information with complex requirements. IT and

business units alike should view it as a business investment that is capable of delivering long-term value and continuous improvement.

However, to get beyond simply being "suppliers of technology" and have an impact on how their organizations get value out of their information assets, IT has to face inconvenient truths when evaluating ECM systems.

Read on to learn two key areas where IT can provide important insight into their organization's ECM purchase.

VENDORS USE THE SAME TERMS TO DESCRIBE PRODUCTS FIT FOR DIFFERENT PURPOSES

Enterprise content management technologies address an exceptionally large number of business problems. Because there are so many more use case scenarios than there are naming conventions for ECM technologies, vendors frequently use the same terms to describe different products. That means products designed to solve diverse problems often have overlapping names and comparing one vendor to another quickly gets very confusing.

Take the term workflow as an example. It's a term used in virtually every ECM technology in the market. However, even though the technologies are called the same thing, they are not designed to do the same things or even solve similar problems.

See the table below for just a sample of how confusing a seemingly simple term can become.

Workflow Reference	Use Case
Feature of a collaborative document authoring and workspace platform like Microsoft SharePoint®	Handles task management and publishing approval for collaboratively authored electronic documents
Stand-alone intelligent data capture product	Intelligently recognizes data on a scanned image, extracts it and automatically routes it to the appropriate data field in a business application like an ERP suite
Digital asset management (DAM) system	Provides a user experience tailored to support how marketing professionals handle rich media assets
ECM platform for managing transaction and case-driven processes	Leverages a rich array of document metadata and business rules to manage how people and systems interact with documents in the context of complex operational process like insurance claims handling or student admissions

The same issue arises with other ECM terms, including document management, collaboration and records management.

Unfortunately, ECM vendors often don't make it easy to understand how their products differ from others. Their websites don't clearly define the problem areas their products address best. What's more, they are tempted to push boundaries and market their technologies as solutions to problems they weren't meant to tackle. Understanding which vendor is right for your needs can be very difficult to decipher.

What You Can Do About It

All ECM technologies are designed with a problem scenario and a typical end user in mind. Do the following before beginning your search for the tool to do the job:

1. **Make every effort to understand the content-related problem that is hindering your organization.** Understand what the problem is, why it's a problem and how it's currently being addressed.

2. **Take into account the people who will use the solution.** Different professional roles have different work styles. Choose the system that best supports the way they need to interact with content assets and processes.

3. **Understand the ECM heritage of the vendor and the specific product they are trying to sell you.** Most ECM products typically originated from one of two main schools of ECM:

   - Mostly collaborative authoring and version control of frequently modified electronic documents

   - Mostly capturing, managing and processing fixed content assets like scanned images, e-forms and print stream output, in the context of a transaction or case-driven process

Very few ECM vendors have a single product capable of addressing both of these scenarios well. A vendor that acknowledges as much will be the one that has your best interests in mind. Combining this knowledge with the information around your problem and your users will allow you to make a more targeted shortlist of vendors.

MOST RFPS AREN'T SUITED TO IDENTIFY THE MOST SUITABLE ECM SOLUTION FOR YOU

Although most organizations use RFPs to find a technology solution to a business problem, RFPs are often long on feature/function requirements but short on articulating the nature of the problem that they're seeking to solve. In addition, many RFP processes keep vendors at arm's length, making it difficult for the vendor to ask the discovery questions necessary to propose an optimal solution to the problem.

For these reasons, RFPs are typically best used for evaluating commoditized goods and services where determining what a bidder's product can and cannot do is pretty straightforward. However, because an ECM software solution is not a commodity, it's helpful to consider other ways to evaluate an ECM solution in addition to or in place of the traditional RFP.

Everyone Looks Like they Can Do the Same Thing on Paper

The reality is that there is no one-size-fits-all ECM product or vendor on the market today. There are significant differences between ECM products and vendors, but those differences aren't always cut and dry on paper. Chances are, you'll see little difference in responses provided by an SMB-focused ECM vendor and one that tailors to Global 1000 enterprises.

RFP responses often enable a vendor to explain what their product CAN do, but they don't tell you HOW they do it. And HOW is where you begin to really understand how vendors and products differentiate from one another.

For example, there are significant architectural differences between products. At one end of the spectrum are heavyweight infrastructure vendors that sell complex ECM development platforms that only the largest enterprises have the resources to use effectively. At the other extreme sit offerings that are simple and cost effective for departmental deployments but are difficult to scale and end up introducing complexities organizations typically don't bargain for as they expand to other areas of the organization.

There is a very steep drop off in the number of offerings that provide a middle-ground between these two extremes. The few available are attractive to both mid-tier and large enterprises because these products have been architected to scale both up and down in scope, performance and sophistication.

There are even bigger differences between vendors and products in terms of organizational dynamics, industry domain expertise and go-to-market strategies. Some vendors focus exclusively on ECM while ECM may amount to little more than a revenue rounding error for large infrastructure players. Some sell ECM solutions to defined process problems in specific vertical industries. Others sell ECM as a development platform but rely almost exclusively on the industry domain knowledge of systems integrators to develop industry-specific applications on top of the platform.

Ask yourself critical questions during the selection process:

- What kind of customer would I be to this vendor?

- Would I be a big client or a small one?

- Do I fit in one of the vendor's key target markets or would I simply be an opportunistic win for them?

What You Can Do About It

- **Compare offerings by using scripted use-case scenarios.** These are like mini-case studies that evaluate how a vendor's offering would perform in a given business and technical context.

- **Conduct a "bake-off" between vendors by doing a proof of concept.** This this will give you a feel for the vendor's implementation teams and how well they work with your in-house team.

- **RFP processes often keep vendors at arm's length and make it difficult to understand your requirements.** Give vendors time and access to gain insight into the problem you're trying to solve and the outcomes you want to achieve. Doing so will better enable the vendor to come up with a solution that is suitable for your organization.

CONCLUSION

With these two truths in mind, IT has a foundation to offer strategic insight to their business units. It's this kind of information that moves IT from a hindrance asking for technical details to a business partner integral to the software buying process.

To learn about more "inconvenient truths," visit Hyland.com/MagicQuadrant.

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