

ECM Initiative Update

Master Contract Status
Vendor Fairs
Educational Outreach &
The Repeatable Process

Information Governance Initiative

Steering Committee

Leadership Team
Dave Kirk, Ro Marcus, Leslie Koziara

Principles &
Governance

Leslie Koziara

ECM
Selection

Mike
Birmingham
Sean Krier
Wendy Walker

Proof of
Concepts

Phil Brady

Consultant
Selection

Scott Smith

Communications

Dave Kirk
Ro Marcus
Leslie Koziara

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

Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Content Management



Master Contract Vendors: Ranking on the Gartner Magic Quadrant

 = Apparent Successful Vendor

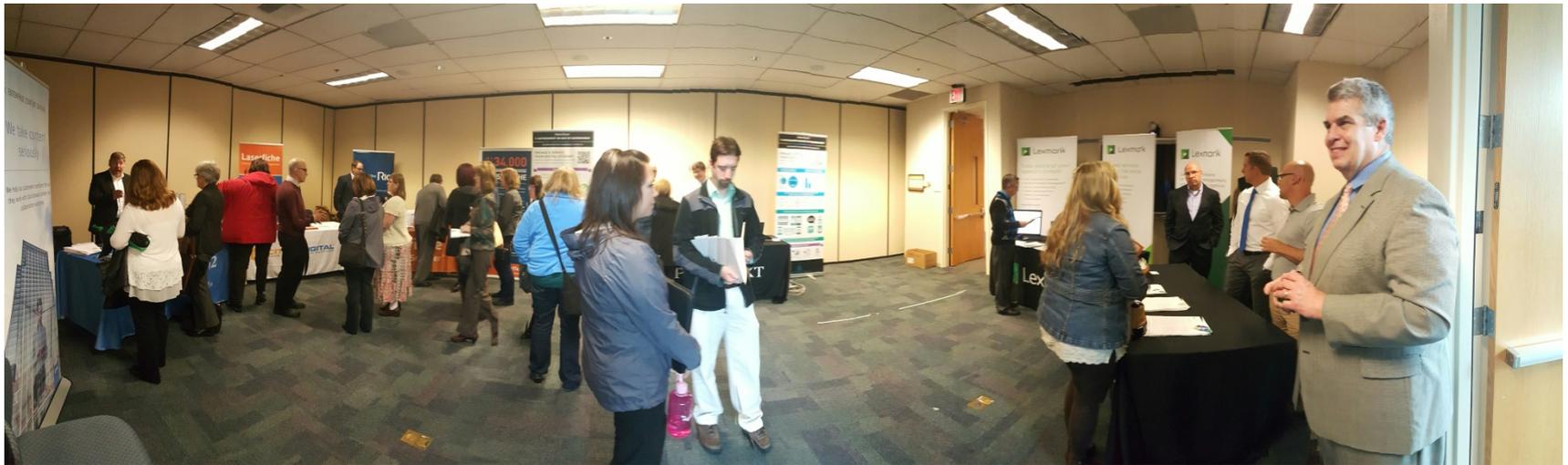
*All Apparent Successful Vendors are DoD 5015.2 certified

Outreach and Agency Empowerment

Helping Agencies Get Ready and Move Forward

- Vendor fairs - how to buy smart
- Boot camps - how to plan smart
- Teaching how to use the ECM master contract
- Mentoring

Vendor Fairs – Demos



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

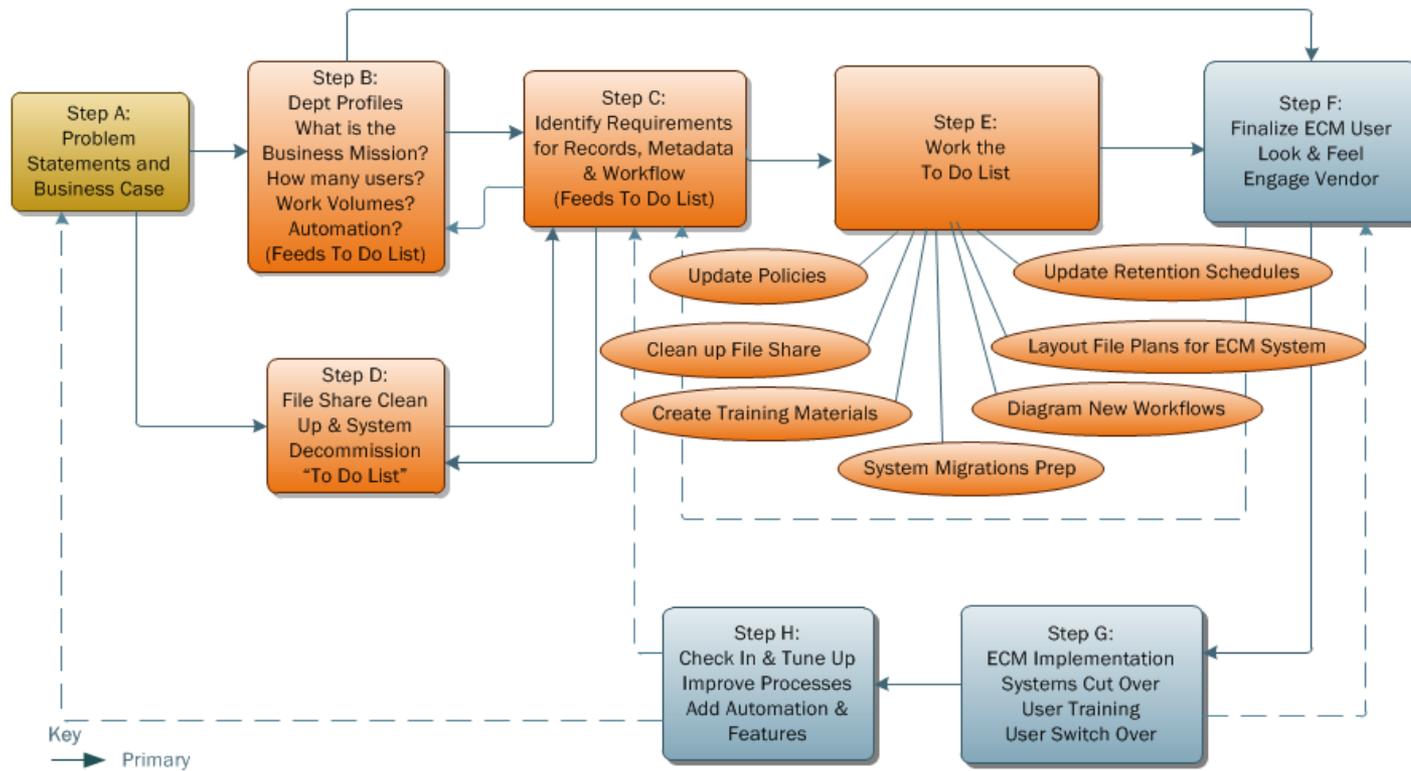
How does it help me?

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

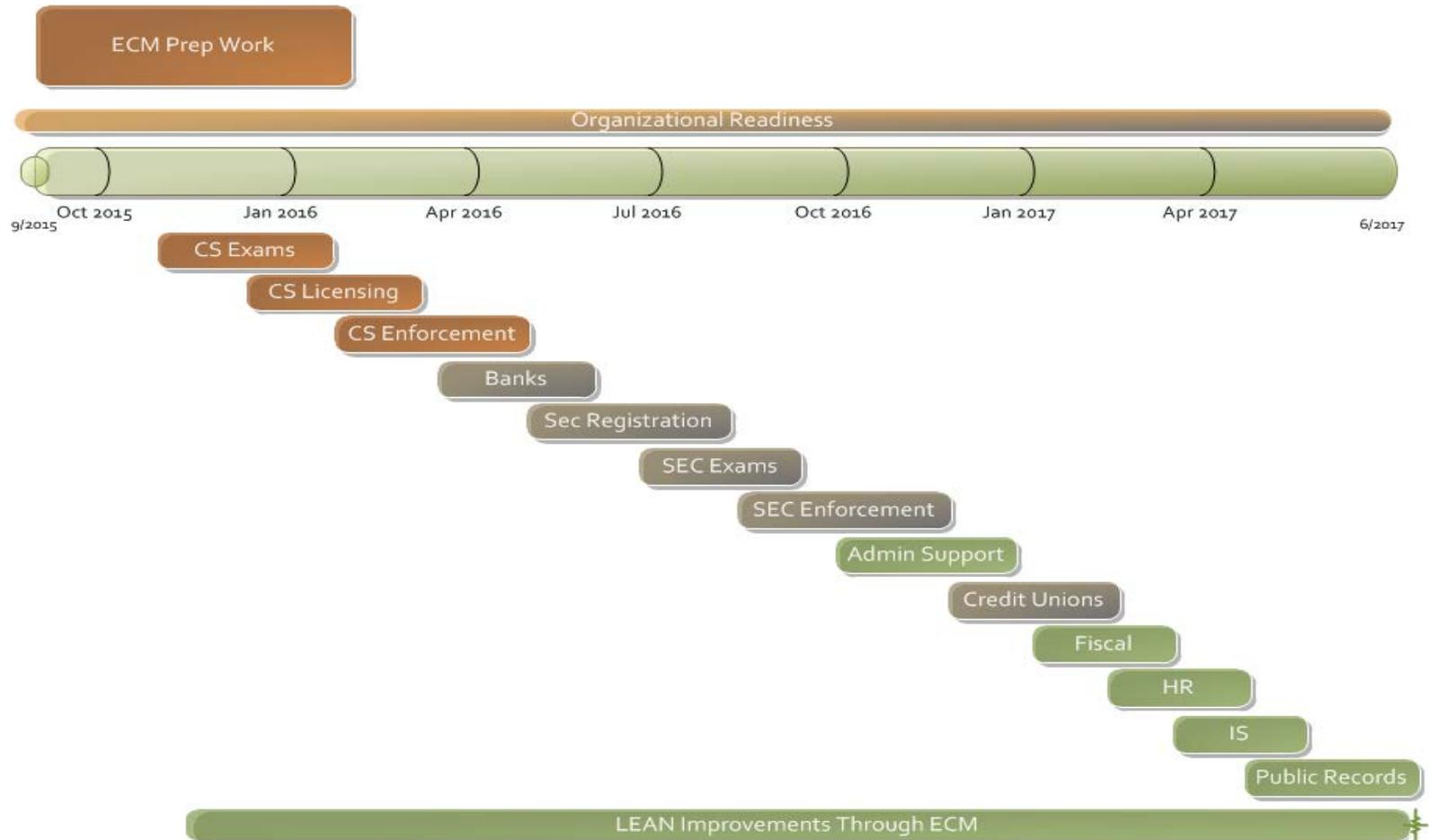
The Roadmap as Outcomes

ECM Implementation Roadmap



ISO 15489 framework illustrated
Source: National Archives of Australia and State Records New South Wales

Repeatable Process



Repeatable Process

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



[ECM Home](#)

[Dashboard](#)

[Project Schedule](#)

[Learning Center](#)

[DFI Intranet Home](#)

ECM STATUS DASHBOARD

Roadmap Phase		Department Profiles (B)	Business & IT Analysis (C & D)			Cleanup Prep Work (E)				Finalize ECM Design (F)		Cut Over/Go Live (G)			Check In (H)		
Department	ECM Selection	Business Unit Overview	Orientation & ECM Principles	Records/Document attributes from Business Flows*	Risk Assessment	Update Retention Schedules	Update Policies	Data Cleanup*	ECM Integration Planning: STAR, Oracle, Apps	Design ECM for Business Unit	ECM Prototype and Final OK	ECM Install & Config	Migrate X, Files, Oracle & Apps Into New ECM	User Training	Go Live	Check In and Improvements	Improvement Opportunities
Agency																	
4th Qtr - December 2015																	
CS Exams																	
CS Licensing																	
CS Enforcement																	

Drill down into Step Report Cards

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

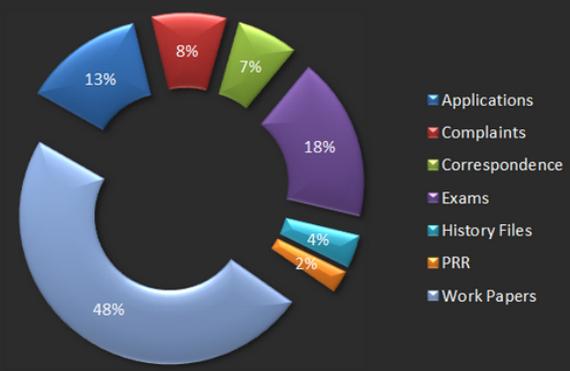
Business Unit Users -

1. Contribute additional information as needed

Volume Volume Volume

Record Volumes

Record Types



Lessons Learned

- 1.
- 2.
- 3.

Surveys

Do you see ways to make your process better? Tell us!

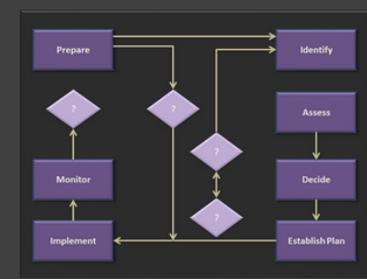
Improvement Opportunities

Where does it hurt?

How are we doing?



Process Diagrams



Repeatable Process

- Make the steps visible and easy to follow

Deliverables

Roles and Responsibilities

ECM Team - Cynthia & Phil

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Business Unit SME -

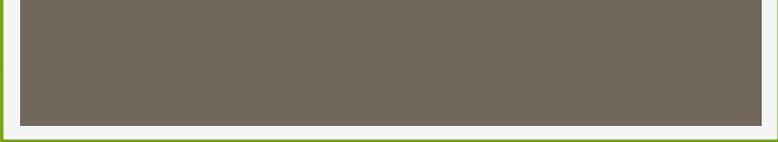
1. Provide existing business unit background information to core team
2. Provide high level information on business unit and processes

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?