Top Ten Success Factors for implementing EDRM

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Agenda

• Introduction
• The top ten
• Questions
Buy in From Above

• Senior Management
  – Identify stakeholders
  – Change Manager to build relationships
• From the top down
  – Pushing up hill is so much harder than down hill
  – Start with the chief Executive if possible
  – Set the standard
• All business areas
  – EDRM affects everyone every day, there’s always something to do
• Times will get tough
  – Things go wrong
  – Set the expectation with management and stakeholders alike
  – Never problems….just challenges!
Change Management

- EDRM Implementation is a change project NOT a technology project
- Develop a structured plan for change start it and never let it stop
- Run with the runners, walk with the walkers but stand still with no man (or woman)
- A business problem not an IT problem
- Win hearts and minds a game of propaganda
- Without people you have nothing
- A great Change Manager makes the difference
- You cannot work hard enough at change
Communications

• Tell them, tell them and tell them again
• Clear concise communications on a regular basis
  – Web site
  – News letters
  – Merchandising
  – Screen savers
  – Web seminars
  – Computer based training, DVD’s
  – Road shows
  – Coffee mornings
• Make them interested
Product fit for purpose

• This is a project in itself
• Be very clear in what you want and what you need!
  – EDM (Hybrid)
  – ERM (Hybrid)
  – ECM
  – Scanning / Capture
  – Web
  – Integration with line of business applications is key
  – Speed and ease of implementation
  – TNA 2 / DoD approved
  – Preferred technology
• Analysis will show you what you need – Does the product deliver?
• The devil is in the detail
Strong Project Governance

• Project board
• Steering committee
• Stake holders
Management of expectations

• Set expectation
• Manage expectation
• Time will be lost, things will go wrong, money will be in short supply
• No surprises
Enthusiastic and Committed Project Team

- Project Manager / EDRM Consultant
- Change Manager
- Business Analyst
- Communications Manager
- Training Manager
- System Administrator
- IT Techie
The right amount of budget

- Think of a figure and add 50%
- No project has too much money
- Corporate wide implementations costs…?
The right implementation process (DIRKS)

• Proven method
• Combine with Prince II
• Model office
• Start slow
• Training is not the sacrifice
• Promise small deliver big!
Meet the needs of the organisation

- Analysis is the key
- Use DIRKS
- Functions and Activities
  - Business Classification Scheme
- Information audits
- Understand what the business does
Summary

- Buy in
- Change
- Comms
- Product
- Governance
- Expectations
- Team
- Budget
- Implementation
- Meet the needs
Further information
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