

# Top Ten Success Factors for implementing EDRM

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# Agenda

- Introduction
- The top ten
- Questions

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# 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!



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# 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 Manger makes the difference
- You cannot work hard enough at change

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# 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



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# 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



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# Strong Project Governance

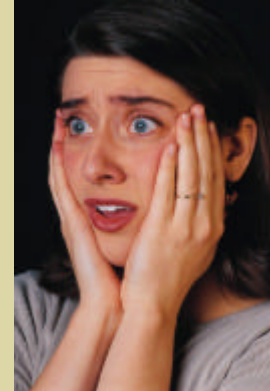
- Project board
- Steering committee
- Stake holders

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# Management of expectations

- Set expectation
- Manage expectation
- Time will be lost, things will go wrong, money will be in short supply
- No surprises

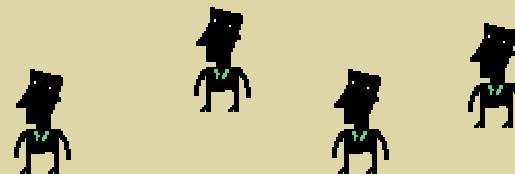


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# Enthusiastic and Committed Project Team

- Project Manager /EDRM Consultant
- Change Manager
- Business Analyst
- Communications Manager
- Training Manager
- System Administrator
- IT Techie



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# The right amount of budget

- Think of a figure and add 50%
- No project has too much money
- Corporate wide implementations costs...?

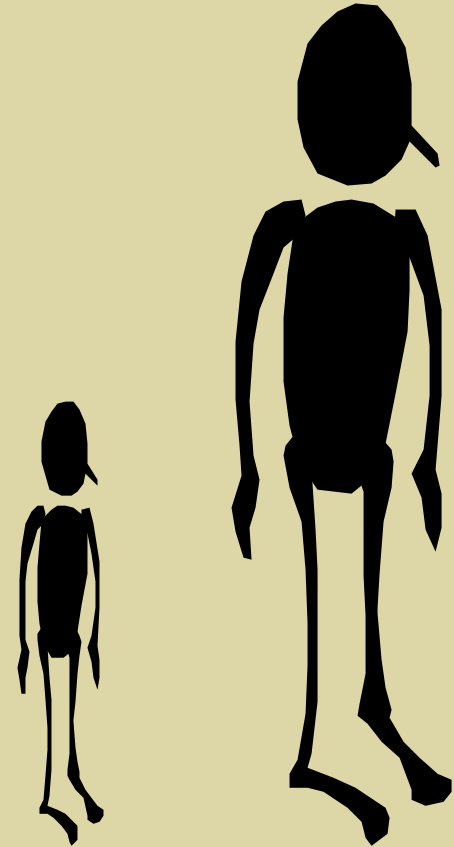


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# The right implementation process (DIRKS)

- Proven method
- Combine with Prince II
- Model office
- Start slow
- Training is not the sacrifice
- Promise small deliver big!



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# 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



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# Summary

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

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Further information

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