



# Developing An Enterprise Communications Management Strategy

October 29, 2014



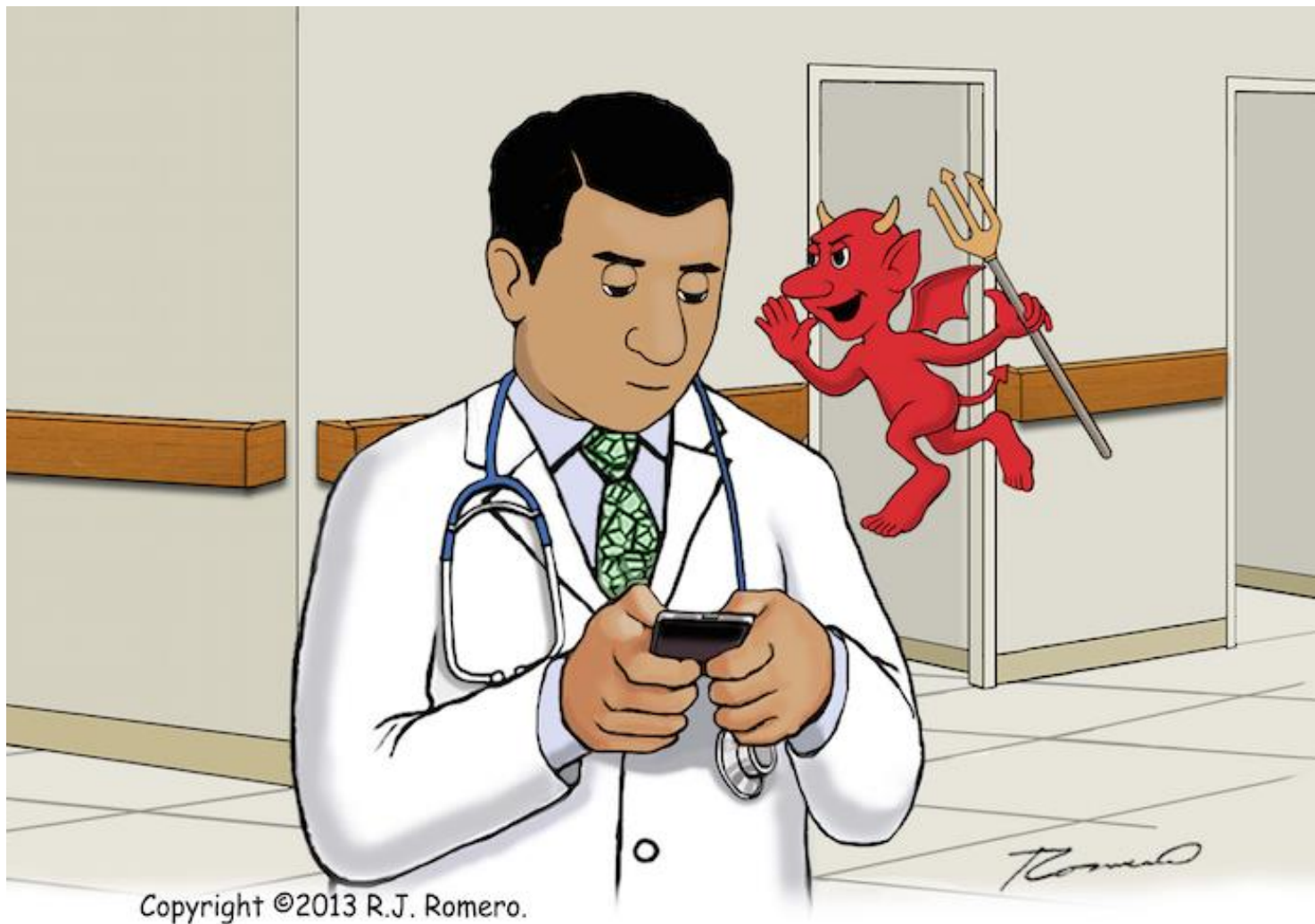


# AGENDA

## Answers Three Questions

- **Why** do you need an Enterprise Communications Management (ECM) Strategy anyway?
- **What** is ECM?
- **How** do I develop a strategy?

Why do you need  
an ECM Strategy?



Copyright ©2013 R.J. Romero.

"Go ahead - use unsecured texting to send patient orders. Everybody does it. What could go wrong?"

# Greatest Challenges in Large Companies



1. Data Complexity and Expanding Customer Touchpoints
2. Emerging Types of Structured and Unstructured Customer Data
3. Achieving Outstanding Customer Service



1. Cyberattacks
2. Customer Expectations
3. Demand Response
4. Dynamic Pricing
5. Regulatory Uncertainty

# More Industry Challenges

## **Mental check list –** how many belong to **your organization?**

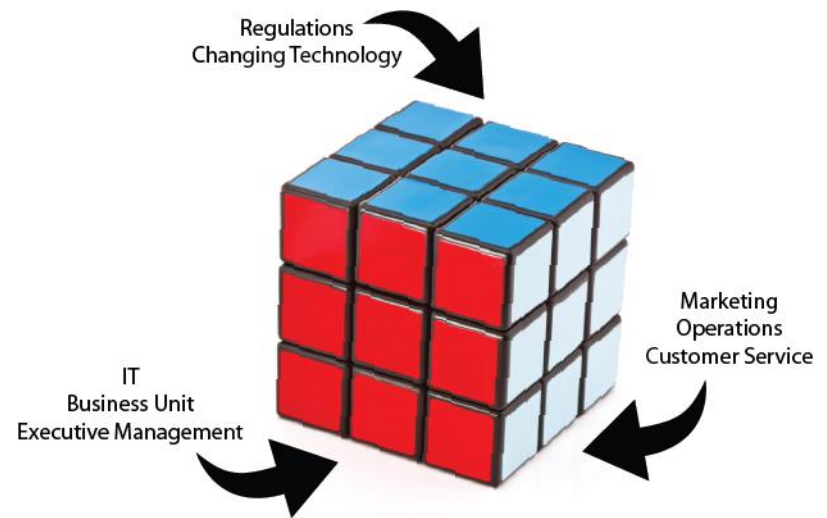
- ✓ Regulatory **Uncertainty**
- ✓ Demands for **Multi-channel** delivery
- ✓ **Risk** management
- ✓ **Customer** acquisition and retention
- ✓ Cyber risk and data **Security**
- ✓ Legacy **Modernization**
- ✓ Dynamic **Pricing**



# Characteristics of Your Organization

Growing Complexity –Multiple technology stacks and teams for:

- ✓ Content creation, generation and composition
- ✓ Process control and workflow
- ✓ Content management and change control
- ✓ Content storage
- ✓ Channels (different for print than email, etc)





CCM  
What it isn't



CCM Workflow Strategy



# What is ECM?

Most call it “Enterprise Content Management”

## ECM

**Enterprise Content Management (ECM)** is a formalized means of **organizing and storing an organization's documents**, and other content, that relate to the organization's processes. The term encompasses strategies, methods, and tools used throughout the lifecycle of the content.

**Enterprise Content Management (ECM) - Wikipedia**  
[en.wikipedia.org/wiki/Enterprise\\_content\\_management](https://en.wikipedia.org/wiki/Enterprise_content_management) Wikipedia ▾

*While some are more inclusive, most definitions focus on **CONTENT**, **ORGANIZATION**, AND **STORAGE**, Not **Communications**.*

(AIIM)

## What is Enterprise Content Management (ECM)?

Enterprise Content Management (ECM) is the strategies, methods and tools used to **capture, manage, store, preserve** and deliver content and documents related to organizational processes.

### Enterprise content management (Thefreedictionary.com)

**Enterprise content management (ECM)** is a formalized means of organizing and storing an organization's documents, and other **content**, that relate to the organization's processes. The term encompasses strategies, methods, and tools used throughout the lifecycle of the content.<sup>[1]</sup>

#### Definition

The [Association for Information and Image Management \(AIIM\)](#) International, the worldwide association for *Enterprise Content Management*, defined the term in 2000. AIIM has refined the abbreviation *ECM* several times to reflect the expanding scope and importance of [information management](#):

#### Late 2005

*Enterprise content management is the technologies used to Capture, Manage, Store, Preserve, and Deliver content and documents related to organizational processes.*

#### Early 2006

*Enterprise content management is the technologies used to Capture, Manage, Store, Preserve, and Deliver content and documents related to organizational processes. ECM tools and strategies allow the management of an organization's unstructured information, wherever that information exists.*

#### Early 2008

*Enterprise Content Management (ECM) is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM tools and strategies allow the management of an organization's unstructured information, wherever that information exists.<sup>[1]</sup>*

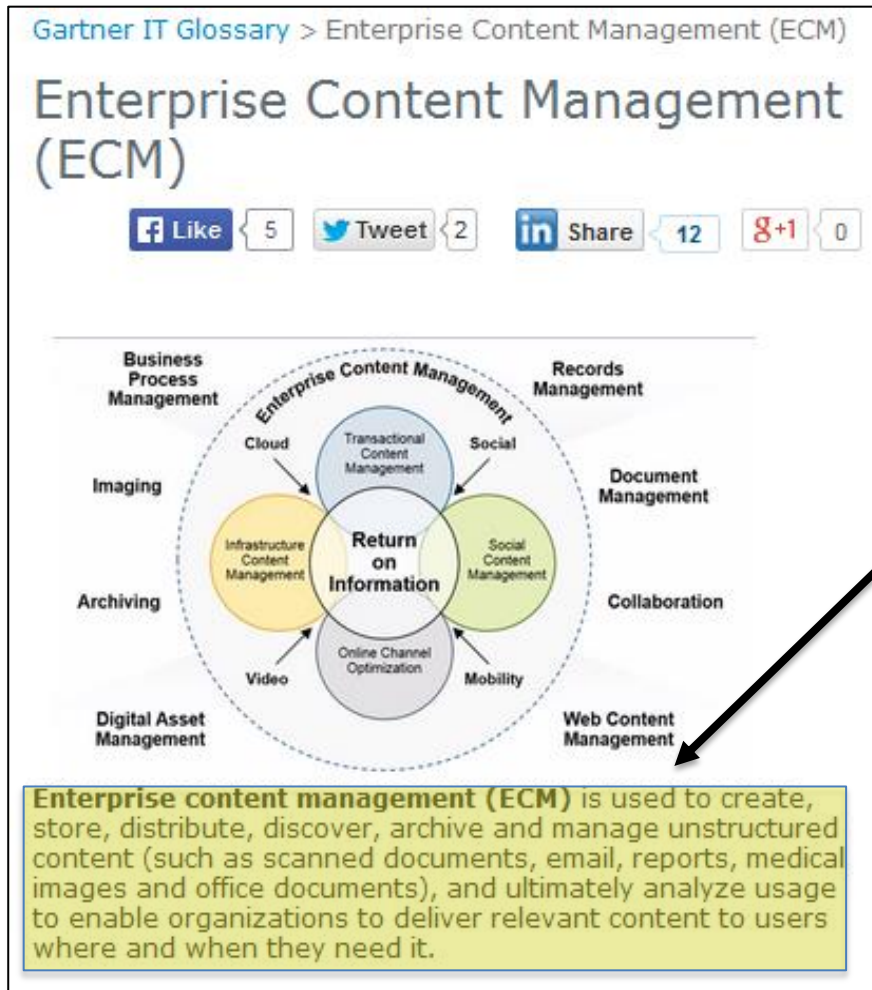
#### Early 2010

*Enterprise Content Management (ECM) is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM covers the management of information within the entire scope of an enterprise whether that information is in the form of a paper document, an electronic file, a database print stream, or even an email.<sup>[1]</sup>*

The latest definition encompasses areas that have traditionally been addressed by [records management](#) and document management systems. It also includes the conversion of data between various digital and traditional forms, including paper and microfilm.

# Gartner's Definition

*is most inclusive but still somewhat incomplete*



The focus is more IT-centric; how to manage the content so that it can be delivered. Our intent is to include the actual communication to the 'end user' – the consumer.



## Enterprise Communications Management

- All of the systems, processes, technologies and people involved in creation, management, and distribution of omni-channel content and messages
- *Messages* are the actual communications themselves
- *Omni-channel*: any and all channels - email, print and mail, text messaging, social media, etc.

# Start with Enterprise Goals

## **Reduce Costs and Complexity: Adopt an enterprise-wide integrated, communications and automation platform for messages**

- Reduce Capital and Expense Costs
- Support a customer-centric communications strategy
- Meet all info security and privacy standards

## **Provide visibility, command and control over communications flow**

- View of communications / documents in all stages; end-to-end visibility
- Complete, real-time control over document flow from data receipt and composition, through print, distribution, all channels and mailstream as appropriate

## **Operational and technical efficiencies**

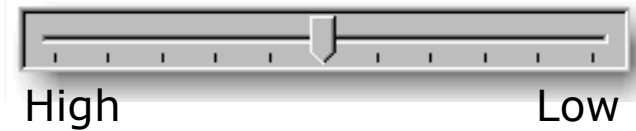
- De-couple document composition and electronic production from print and distribution vendor - obtain best value
- Automate and streamline internal operations with 100% SLA achievement
- Facilitate conversions and composition with *information redesign*

## **Retain control of critical data, customer communications and IP**

- Isolate business rules and provide client control by business unit
- Conduct data validation, provide rich reporting and control of communications

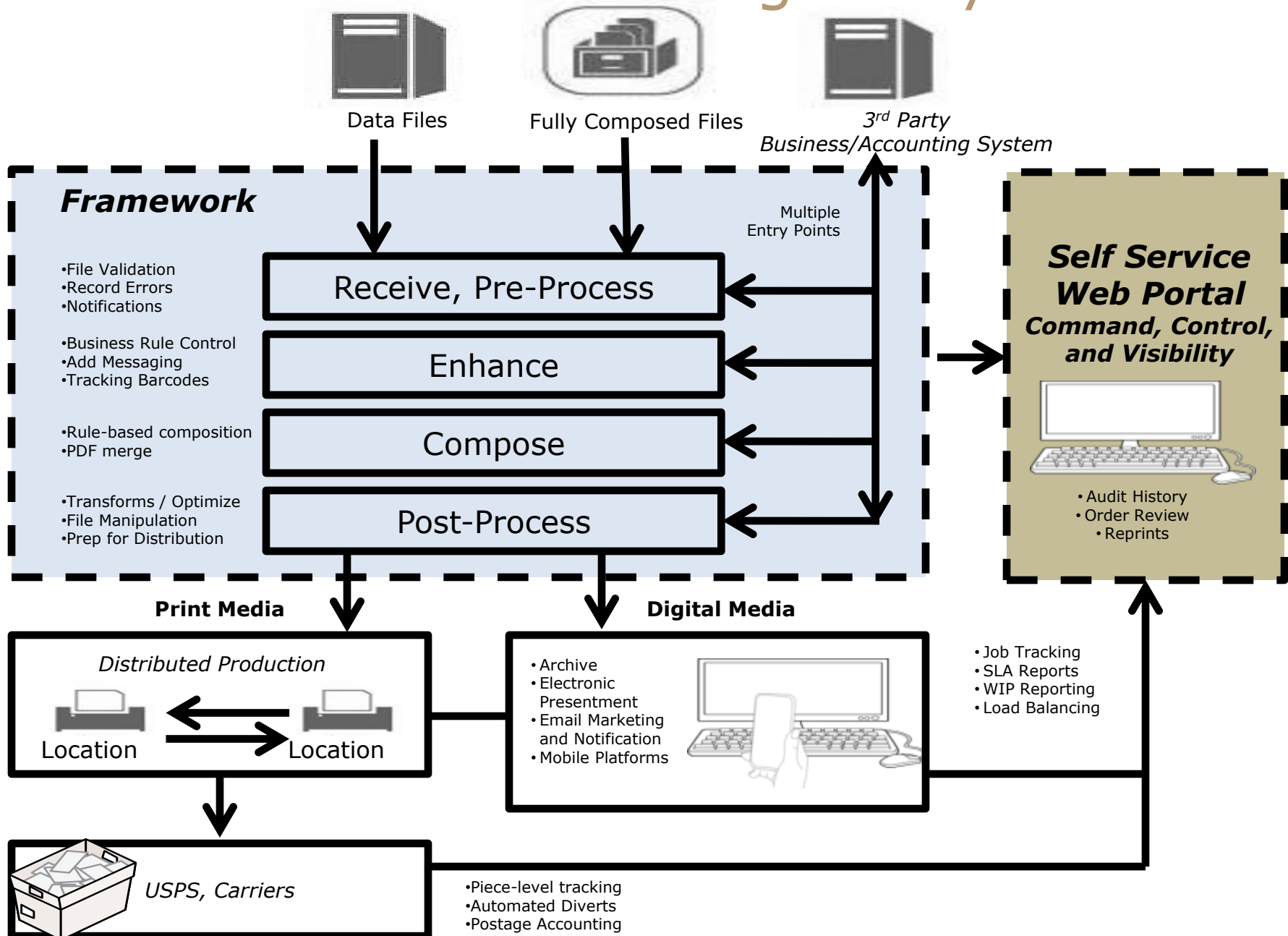
# Framework Decisions

## Answer these Questions...



Factor	Implications
How constrained is your Capital budget year-to-year? Is it predictable?	Unlimited Capital budget? Build your Cadillac. Capital tight? Convert to a variable model.
How de-centralized is your CCM decision-making? (Business Unit autonomy)	Autonomous business units should each have an ECM strategy, but adhere to a corporate standard guidelines.
How tightly aligned are marketing, IT and operations?	If marketing and IT are in conflict, it probably is due to lack of responsiveness and flexibility.
To what degree do you want to retain full control over your business rules and messaging IP?	Outsourcing to a Print Service Provider (PSP) with ownership of your messaging IP might be acceptable, but makes switching difficult and costs prohibitive.
How tightly coupled to any particular technology do you want to be? Conversely, do you want the flexibility to adopt new technology?	Internally managing a single set of technology products implies ongoing maintenance, upgrades, high switching costs. Same with PSP.
Does your organization feel that managing ECM is a core part of your business?	Is managing and maintaining the ECM technology stack really a market differentiator for you? Or is it flexibility, lower cost, and ability to change?
To what degree are you being driven to multi-channel communications?	Are your customers satisfied with only print and mail? Are you looking to decrease your print and postage costs?

# Document Processing Ecosystem



# ECM Success Stories

## REGULATED

**7 million** individual Medicare Part D welcome kits and notices for the market leader in **healthcare benefits administration** implemented an end to end ECM strategy and **never missed** an SLA.

## COST REDUCTION

A top 25 **mutual fund** company **migrated** their outsourced legacy applications to an **ECM cloud**, generating over **2.3MM client welcome kits** in 2013 with **100% accuracy** and **reduced costs by 46%**.

## SPEED TO MARKET

In 2013, the largest global **variable annuity company** implemented an ECM solution to **reduce development time** from 18 to 3 months. The additional 15 months on the market generated an **estimated \$1.5 billion in new assets under management**.

## AUTOMATION

A large privately held mid-west **life insurance company** cut their **operating budget** almost **in-half** by automating their **enterprise policy print** production on an ECM cloud.





# Developing An Enterprise Communications Management Strategy

## Questions?

