Successful Project Completion: An Agile Approach to Enterprise Content Management (ECM) Project Delivery

It is often thought that price factors are the main reason for high customer turnover. While this is sometimes the case, we believe customer retention is directly impacted by the quality of customer service. But providing exemplary customer service is not always easy, especially when it comes to software. After an order is placed, traditional product implementations can take several weeks to install, with a single technician at the helm. With time being a major factor, meeting all customer expectations can prove challenging. If the right approach is not taken, issues can begin to arise, including breakdowns in communication, rushed deployments and limitations on product training.

When an Enterprise Content Management (ECM) purchase is made, the project is just beginning. Once expectations are identified, it is then time to carry out a process that will deliver the most effective product implementation. Some of the most successful organizations have adopted a method known as agile project management, which uses cross-functional team collaboration to provide accurate, timely, and efficient solutions delivery, ensuring 100% customer satisfaction.

According to the research organization CIO, by applying the agile project management method, the time to project completion is 37% faster, and team productivity increases by 18% on average. Following a set of principles based on technician expertise, the agile project management methodology ensures a project is worked by the most skilled engineer for each unique step of the process. As requirements evolve, a project manager is always on hand with high-level visibility into the progress and can make flexible scheduling changes as needs arise.

While agile project management is a method that many organizations have used with success, it takes an intelligent team to follow an ironclad process, making sure it is carried out effectively. Let's take a look at a high-level example of how a typical ECM project could potentially be serviced with the agile project management methodology:

1. **Project Kickoff** - With a goal of document process reengineering and improvement, high level project milestones start immediately. A Project Manager, will conduct the initial kick-off call and will broker all client communication throughout the project. Specialized technical resources will be assigned to handle the backend development work.

2. **Infrastructure Review** - The assigned technician will use their comprehensive architecture knowledge and implementation best practices to plan for deployment and performance expectations. Company IT policies will be discussed as well as end user functional requirements.

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3. **Discovery** - The customer and technician will develop a shared, better understanding of who the software administrators are as well as their needs, motivations, and behaviors. The team will then adopt best practices to validate deployment architecture and optimize your installation plan.

4. **Document Capture & Data Extraction** - The capture team will assess and begin installation of the company's <u>document capture</u> requirements, which could include multifunctional printer or desktop scanner integration.

5. **Content Repository Design** - The ECM software will be customized and built out to the specific needs and wants of the customer. This may include unique folder structuring, table layouts, and database organization.

6. **Business Process Automation Design (Optional)** - Document routes are mapped out as automated process workflows within the ECM system. The technician will include any required steps such as manager approval, data validations, email notifications, and more.

7. **Integration with Line of Business Applications (Optional)** - If necessary, the technical will integrate the ECM system into the customer's <u>existing business programs</u>. This may include Microsoft Outlook®, Salesforce®, QuickBooks®, and more.

8. **End User Training** - The technician will provide one-on-one training to ensure the customer understands the ins and outs of their new ECM system. All questions can be answered live during the administrative training and additional documentation is provided as needed.

9. **Go-Live Support** - It's go time! The technician will be on hand with the customer when the new ECM software goes live, to personally attend to any questions or immediate changes to the set-up.

While these are only some examples of how a project under the agile project management methodology could play out, this style can have an enormous impact on team collaboration, project flexibility and completion, resulting in an extremely satisfied customer. From architecture review to intuitive product training, agile project management is designed to meet company needs in an open and accurate manner. Facilitated through consistent communication, customers can rest assured that deployment requirements are met and best practices are established.

At Square 9, we understand the importance of delivering timely and accurate ECM solutions. Contact us today to learn more about our Professional Service Group and our proven method to effective solutions delivery.

Marketing Communications Manager **Lauren Ford** is the dynamic voice behind Square 9 Softworks. Delivering highly effective messaging across reseller channels, end user communities and outside agencies, Ford develops, drives and executes communication plans that effectively support Square 9's overall marketing goals and objectives. To learn more visit www.square-9.com.