

Is EDRM mainstream?

Malcolm Beach wonders whether electronic document/records management will ever be as ubiquitous as email.

THE ELECTRONIC document and records management (EDRM) market has continued to grow over the last few years. Awareness of EDRM is increasing and many technology implementations have taken place.

Within the public sector, much of this increased interest has resulted from initiatives such as Modernising Government, which focused government organisations on electronic records management.

The private sector has also had regulations and compliance requirements imposed on it. And all organisations have had to address the growth of information.

So has EDRM come of age? Is the implementation of systems to support EDRM commonplace enough for them not to be seen as unique projects? Is introducing EDRM a standard consideration for organisations across all sectors, just like implementing an email solution?

In short, is EDRM mainstream?

For anyone working in this area, or those attending conferences, seminars and trade shows, the answer would seem to be an obvious 'yes'. The latest AIIM Roadshow (May 2008) made the claim that enterprise content management – and by implication, EDRM – is now mainstream. But is this really the case?

It is only natural that EDRM conferences will be positive, promoting and predicting growth in this area. But what about the rest of the workforce – those whose jobs involve delivery of manufacturing goods, financial advice, social services, etc? How does EDRM relate to them, if at all?

It is certainly true that EDRM, and awareness of the

issues surrounding it, is growing. The well-publicised loss of sensitive CD-based information by HMRC last year, and other recent security lapses, have provided a stark reminder of the need for good information management, as well as highlighting the sensitivity of the information that we hold.

However, EDRMS implementations are still not commonplace and are still treated as special projects for organisations.

So maybe the more appropriate question is, will EDRM become mainstream? And if so, when?

Pros

There are three main reasons why EDRM may become mainstream:

- The need to effectively manage the growth in information.
- Compliance requirements.
- The impact of SharePoint.

Information growth

We all know that information growth is a fact. As Intellect's recent paper, *Document management concerns the whole board*, put it: "The problem is not going to get worse, it's going to get much worse."

Email in-boxes are bulging, IT budgets continue to fund more storage space and paper files refuse to go away. All of which contributes to the necessity to try and bring some form of order to this mountain of information, parts of which are essential to the success of a business.

So what to do? There are a number of solutions and approaches available. Some are targeted (eg, email archiving) whereas others attempt to address a wider scene (full

enterprise content management).

Inherent in most of these approaches is the attempt to manage information volumes and put some structure into the information. This can be done by categorising it; removing duplicates; digitising paper so that people can more easily find information; or deleting it after a set period of time.

EDRM fits naturally into this kind of scenario. One of its basic aims is to control the information that companies have and to put in place structure and lifecycle. Rather than keeping information forever, companies attempt to hold it only for as long as necessary.

Doing this with standard network drives is difficult at best, and more likely never done. So EDRM, with its policies, processes and accompanying technologies, assists organisations in this area. EDRM helps organisations to address and manage information growth.

Compliance

Compliance will continue to be an important requirement in any business. According to Jeremy Clarkson, writing in *The Sunday Times* last year, over 2,500 new pieces of legislation have been introduced each year for the past 10 years!

We live in an environment where the addition of new regulations seems to be almost mandatory as a way of addressing problems. The last few months have seen a number of cases where personal information has been lost.

So, compliance has implications for record keeping and solid information management practices. Meeting compliance requirements

requires structured approaches, of which EDRM is one.

SharePoint

The ongoing progress of Microsoft into the EDRM/ECM market will continue to have a significant impact in raising awareness of document and records management, and moving it into the mainstream.

The release of Microsoft SharePoint Server 2007 (MOSS 2007) has firmly placed Microsoft as a serious player in this market.

Whether MOSS 2007 is a full EDRMS can be debated, but it certainly contains functionality that is present in a mature EDRMS.

The appeal for clients already using Microsoft solutions and considering implementing SharePoint, is the apparent ease and cost with which it can be integrated with existing systems and thereby provide EDRM capabilities, without the need to buy a product from a different supplier.

The result of all these factors is that EDRM has become much more accessible without the need to buy a specific EDRM application, a position that will appeal to many companies.

So EDRM moves into the mainstream market, even if it is not specifically labelled as such.

Cons

There are also a number of reasons why organisations will choose not to implement EDRM solutions and why EDRM may not move into the mainstream over the next few years.

Three situations that will cause organisations to delay the implementation of an EDRMS are:

- Lack of priority.
- No realisation of a problem.
- Cost justification.

Lack of priority

Companies everywhere face challenges to their tactical and strategic direction. Competition, new regulations and changing business environments mean

organisations are continually assessing how they need to organise and operate.

Some of these challenges are urgent and have deadlines which require a concerted effort in order to achieve them. Against this backdrop, an EDRM project to improve information management can seem less important, or certainly less urgent – the obvious exception being when EDRM is mandated by regulations.

The intangible nature of information means that any information management project can drop in priority below that of other issues.

So whilst not denying the importance of EDRM, organisations may feel they need to concentrate on more important and urgent work. EDRM is viewed as a special project, not mainstream.

Problem? What problem?

Another reason why EDRM is not implemented is lack of awareness in organisations that there is a problem it can solve. Email overload? Let's just implement email archiving. Can't find information? Let's buy a search engine (or download Google Desktop).

Until organisations recognise and accept that EDRM can help

to address their business problems, it will continue to be seen as a niche application targeted towards specific problems.

Although this appears to be changing, I suspect that for at least some organisations, EDRM is perceived as a technology solution looking for a problem.

Cost justification

No matter what project an organisation is undertaking, the issues of cost, ROI and benefits must be considered. And herein lies one of the challenges for EDRM.

The costs of implementing an EDRMS can be fairly easily identified (if only for hardware and software). However, the benefits and ROI are more difficult.

Some of the benefits are intangible or hypothetical (eg, 'Spending money on an EDRMS will avoid the cost of problems arising from not managing my information correctly, which I ascertain as £x').

I have seen a number of business cases for EDRM projects and intangible benefits feature strongly in most of them. This is not a bad thing, but shows that an EDRM initiative is not a simple matter of spending £x to gain £y.

The problem for an organisation is the difficulty of quantifying the figures when attempting to answer the question: is the amount that I am spending providing me with sufficient benefits to justify my expenditure?

Without a nice neat business case and cost justification, EDRM can be seen as too nebulous, and therefore obviously not mainstream.

Conclusion

If EDRM is not yet mainstream, then weighing up the pros and cons, I believe it will become so in the next two to four years.

The need to manage information is a universal and mainstream problem facing all organisations. Most companies realise this and are taking steps to act.

As time goes by, it will become more apparent that the principles of good information management (and EDRM) must be followed for any solution to be successful. Organisational size may determine the shape and nature of the implementation and whether it is called EDRM, but the principles will be the same.

We may not call the work, or the solution, EDRM, but it will be just that.

The drivers for organisations implementing an EDRM solution will continue to be mixed:

- Some adopt it because they have to (ie, compliance).
- Some for business gain.

Organisations may have difficulty defining the exact costs and benefits. But regardless of the terminology, or the drivers, EDRM will move into the mainstream – a solution that organisations will address and consider just as they address and consider email software.

● *Malcolm Beach is a senior consultant with AMTEC Consulting plc specialising in EDRM. Tel: 01252 737866. Email: malcolm.beach@amtec.co.uk.*



Malcolm Beach: intangible benefits feature strongly