



HOW TO PICK THE APPROPRIATE ECM AND DOM PRODUCTS

MAKING BETTER DECISIONS TO SELECT THE RIGHT ECM AND DOM PRODUCT

Abstract

Due to the presence of multiple vendors in the market providing loads of products in the areas of enterprise content management (ECM) and document output management (DOM), selecting the right fit for your organization-specific needs has become more challenging these days.

This white paper looks at the ideal ways to select the right product in the area of ECM and DOM for your organization.

With the increasing awareness about various commercially -off-the-shelf (COTS) and customizable ECM products available in the market, there has been a good adoption rate for ECM-based solutions. Various industries and domains adopting ECM include banking, financial services, and insurance (BFSI), power and energy, healthcare and life sciences, manufacturing, retail, IT and telecom, tourism, media / entertainment, government and defense, transportation, and so on.

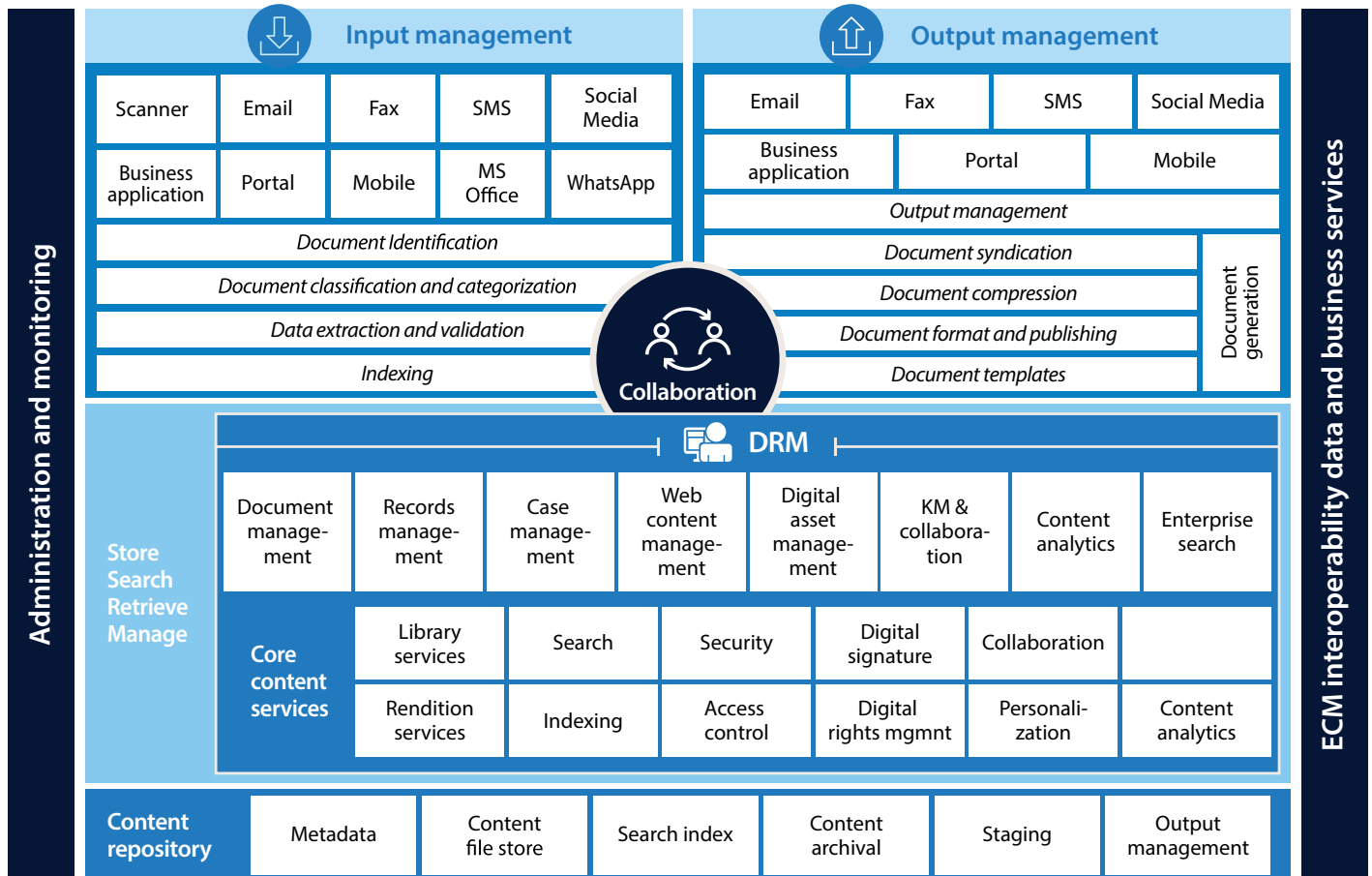
ECM is the process of capturing, storing, delivering (to multiple channels), and preserving the content, metadata associated with the content, documents, and information, relevant to the business of any organization or unit.

An ECM system helps in:

- Managing the unstructured content that could exist in various forms like documents, forms, reports, images, audio / video files, emails, and so on
- Capturing / creating new content
- Associating the relevant metadata with the content
- Efficient document management using workflows like business process management (BPM)
- Searching the content faster and more effectively through controlled access
- Managing the unstructured and structured content from ERP and CRM systems as well as through portals
- Reviewing and approving the content more effectively and quickly by multiple users



Figure 1: ECM-DOM reference architecture



Core components of an ECM system

The core components of an ECM system include document management system, web content management, digital asset management, records management, eDiscovery, reports management, and correspondence management.

Document management system (DMS) – This system stores and manages the documents effectively in electronic form. Key features include:

- **Document creation / capture:** Documents can be either created on your own machine using tools such as Microsoft Word and Excel, Adobe Acrobat writer, etc., or can be ingested into the content server by scanning the physical documents into the electronic formats using the scanning modules / physical scanners attached including scanning records within organizations
- **Version control:** Various major and minor versions of the documents can be created and tracked. This mechanism ensures that documents are audited effectively for history based on compliance and other legal needs within organizations
- **Library services:** Check-in / checkout documents in the content server-based repository to allow multiple users perform modifications on the documents
- **Taxonomy:** Classifying the documents based upon the metadata and storing them in a predefined folder structure. This is key to any organization during the process of building ECM systems and defining the path for storing various types of documents
- **Life cycle management:** Management of a document over the various stages of its life cycle like create, review, approve, publish, and archive. There are even capabilities wherein these different stages can be associated with business processes like automated emails / alerts
- **Search:** Allows users to perform attribute-based as well as full-text searches for documents. For full-text searches, there are various parameters within which the search is enabled to find key items within the documents
- **BPM / workflow:** Automates business processes required for managing the documents effectively by moving them within the organization based on the business requirements
- **Content transformations / rendition:** Allows documents to be transformed from one format to another
- **Annotations:** Allows users to apply the available annotations while reviewing and approving content / documents
- **Security:** Controls access to the documents based upon the role. Other security features like access control lists (ACLs), authentication mechanisms like lightweight directory access protocol (LDAP), claims-based authentication, secure sockets layer (SSL), and digital certificates, are also supported
- **Portal integration:** Allows publishing the content directly on the enterprise portal server
- **Content federation:** Content federation services allow retrieval and interaction with content stored in dissimilar repositories. Existing applications remain unchanged and still provide a possibility of having a unified solution for managing content across the organization
- **Document imaging:** Ingest paper-based documents by directly scanning them, or importing through an email or fax server. Various options available to clean up images by using functions like deskewing, removing unwanted lines, and a few other functions. Scanned documents can be automatically segregated followed by indexing and filing at appropriate locations in the underlying repositories. In addition, several recognition technologies like optical character recognition (OCR), optical mark recognition (OMR), and intelligent character recognition (ICR), are supported by most of the imaging products
- **Storage technologies:** Various types of storage technologies used for storing content include hard drives, storage area network (SAN), network-attached storage (NAS), magnetic tapes, optical media (CDs / DVDs), optical jukeboxes, magneto-optical drives, cloud computing servers, and so on.





Web content management (WCM):

To obtain the maximum output from your enterprise website or portal, a WCM system helps in automating the process of creating, approving, and publishing the dynamic content in a highly personalized manner with inbuilt multilingual support. It enables the nontechnical business users to create their own content as well as to publish it directly on their enterprise websites or portals. An ideal WCM solution minimizes or even completely removes the need to know technologies like HTML, JavaServer pages (JSP), and XML, for the users to be able to work on web content creation, management, and publishing.

Nowadays, web-based collaboration tools are becoming quite popular among users as well as customers to coordinate and

collaborate with each other. So, an ECM system with inbuilt collaboration tools or with the possibility to integrate with any third-party collaboration tools enables the different teams to collaborate and work together on a common task more effectively. Some of the key benefits of this collaboration include more effective strategic planning, decision making, building consensus on new product design or new policy making, better coordination of supply chain, effective client engagement / enablement, and lots more.

Other key features and items, which are part of WCM are:

- Localization
- Communities
- Integration with mobile devices
- Templates

- Content authoring
- Personalization
- E-Commerce

Digital asset management (DAM): It is a type of document management system that deals with managing digital assets like pictures, audio / video files, PPTs, and any other advanced media type. It enables the business users to store, track, organize, and distribute digital assets very effectively along the supply chain and that too across multiple channels. Making use of DAM enables large enterprises to advertise their products better, promote their services, train customers and employees, and above all, set up their brands at a global level, effectively.



Records management: Records are documents having some evidentiary, long-term business value. Records are managed using the retention policies, i.e., retaining documents within organizations depending upon business regulations and industry practices. Each of the documents within an ECM system has the potential to be declared as a record at a later stage. Records management enables an organization to associate a typical life cycle to a document that drives it through various stages like create, store, maintain, publish, and ultimately archive and store as a record.

File plan is used as a virtual filing cabinet by a records manager to store records, folders, categories, and retention / disposition schedules. Records and folders can be added to a Hold (a type of folder which is used to store the records or other folders

to suspend their retention schedules for a certain period of time) to freeze them, thereby suspending their retention schedules.

eDiscovery: As most of the transactions happen over the Internet / email, there is a higher risk of litigations. Hence, it is very important to have eDiscovery policies in place to protect, audit, and retrieve the information when required to defend your organization in case of any litigation. A good eDiscovery solution helps setting up policies for securely archiving the crucial documents without extra cost.

Reports management: A good ECM product should be able to provide either inbuilt reporting capabilities or the ability to integrate with the other reporting tools available in the market. Most of the reports

management tools support advanced features like:

- **Data mining** – Create complex queries for extracting required information in the report
- **Annotations** – Add information to the report without changing the original data
- **Form overlays** – Add background image to a report
- **Object linking and embedding (OLE)** – Enable easy integration with other Windows applications

Correspondence management: Helps preserve emails and other messages that might be required for later use, may be for any litigation, and regulatory investigations. It also provisions the creation, management, and delivery of the personalized, interactive, and secured correspondence.

Document output management (DOM) – An overview

DOM or forms management is the process of automatically generating the forms electronically, preferably using the predefined templates. These electronic forms or eForms enable users to prefill or auto-fill the common data by applying some of the predefined metadata values / rules. With the support of barcodes and eSignatures, eForms are gaining popularity these days, especially in the financial and insurance sectors.

Forms management / DOM system helps in:

- Enabling any-to-any output that boosts efficiency by increased throughput, end-to-end document integrity, and re-engineered legacy documents
- Modifying more personalized customer communications by creating forms / letters / campaigns specific to the customer needs and categories
- Delivering documents over multiple channels and in multiple formats
- Increasing flexibility with none or almost minimal impact on other applications or

products involved in the ECM system of an enterprise

- Reducing the costs of creating and processing forms and documents in the long run
- Increasing accuracy of content and delivery
- Inserting or updating a watermark in a document
- Removing hassles in getting the documents signed manually either from the customers or from the employees within the organization by supporting eSignatures in eForms



Components of a DOM system

Template management: Predefined templates according to the business needs can be used to enable authors to more easily create eForms and eventually to enter content into the underlying ECM system. The templates and the forms are typically customized based on the type and format of content to be entered.

Version management: Helps create and store different versions of the documents that could typically be the templates or the actual forms themselves.

Workflow: Like ECM, the DOM application also requires workflows to process the templates and forms to move them through various life cycle stages. Workflows automate the business processes, optimize the utilization of resources that eventually result in better productivity, compliance, and reduce operational and processing

costs. Ideally, a DOM system should provide the framework for supporting the various proprietary workflows and should be scalable enough to support any custom workflows for any specific business needs.

Security: In order to restrict access to the templates and eForms, various security mechanisms like ACLs, LDAP authentication, and SSL need to be implemented (as in case of any ECM system as well) during their creation. In addition, the below mechanisms should be considered from the security perspective.

- **Digital rights management and watermarking** – helps ensure that the forms are distributed to the intended recipient only. It also prevents any illegal usage and distribution of the copyright material
- **Digital signatures** – helps ensure the authenticity of an eForm / document sender and the form itself

- **Public key infrastructure (PKI)** – helps ensure that the business transactions using eForms (over the Internet) are secured using a public and private key pair held by a trusted vendor

Forms designer: Helps design the eForms by providing a mix of standard and rich inbuilt controls to be used depending upon the business requirements.

Rules-based engine: For business process automation, most of the DOM systems provide their own rules engine or the possibility to integrate with any other third party ones. A rules engine is used to define business rules in simple English. It helps define areas where the business rules can be applied and with what priority, in addition to the expiry criteria of the business rules. In a nutshell, it helps you automate your BPM.

Hosting options for ECM and DOM systems

Various options for hosting ECM- and DOM-based solutions exist ranging from private hosting of the servers on-premise to pay-per-use hosting using cloud technology. Depending upon the specific requirements, the respective option could be adopted with the possibility of a hybrid implementation too.



On-Premise

- Servers are hosted at organization's internal data center
- Application development, setup, and configuration is supported by IT



SaaS

- Application hosted and set up by third party vendor
- Costing model is pay per use



Cloud

- Servers are hosted in cloud environment which could be private or public
- Provide ease of scalability



Hybrid

- Organizations utilize combination of above three options
- Allows flexibility to choose hosting options based on application need

Comparison of hosting options

Criteria	On-premise	SaaS	Cloud	Hybrid
Ease of product setup	Low	High	Medium	Medium
Ability to perform development	High	Low	Medium	Medium
Ease of maintenance	Low	High	Medium	Medium
Ease of infrastructure support	Low	High	Medium	Medium
Security	High	Medium	Low	Medium
H/W scalability	Low	Medium	High	Medium
Ease of vendor management	Low	High	Medium	Medium
Ability to customize	High	Low	Medium	Medium
Ability to configure	High	Low	Medium	Medium
Performance	High	Medium	Medium	Medium
Cost effectiveness	Low	High	Medium	Medium
Ease of product upgrade	Low	High	Medium	Medium
Business continuity	Low	High	Medium	Medium
Ease of IT support and management	Low	High	Medium	Medium

Licensing models

Various licensing models are being offered by different ECM vendors. The most common options include per-user instance, server-based licensing, enterprise license, individual core (CPU) based licensing, number of concurrent users based licensing, application-specific licensing, and more. Most of the vendors provide customized offers to customers depending upon their alliance and engagement levels with a particular ECM vendor.



ECM / DOM product selection guidelines for customers

There are no available frameworks / processes identifying the best suited ECM and/or DOM products for a customer's specific needs. The ideal product selection depends upon various factors like the customer's core business needs, optimization of already existing business processes (or setting up the new ones), achieving compliance, and improving the

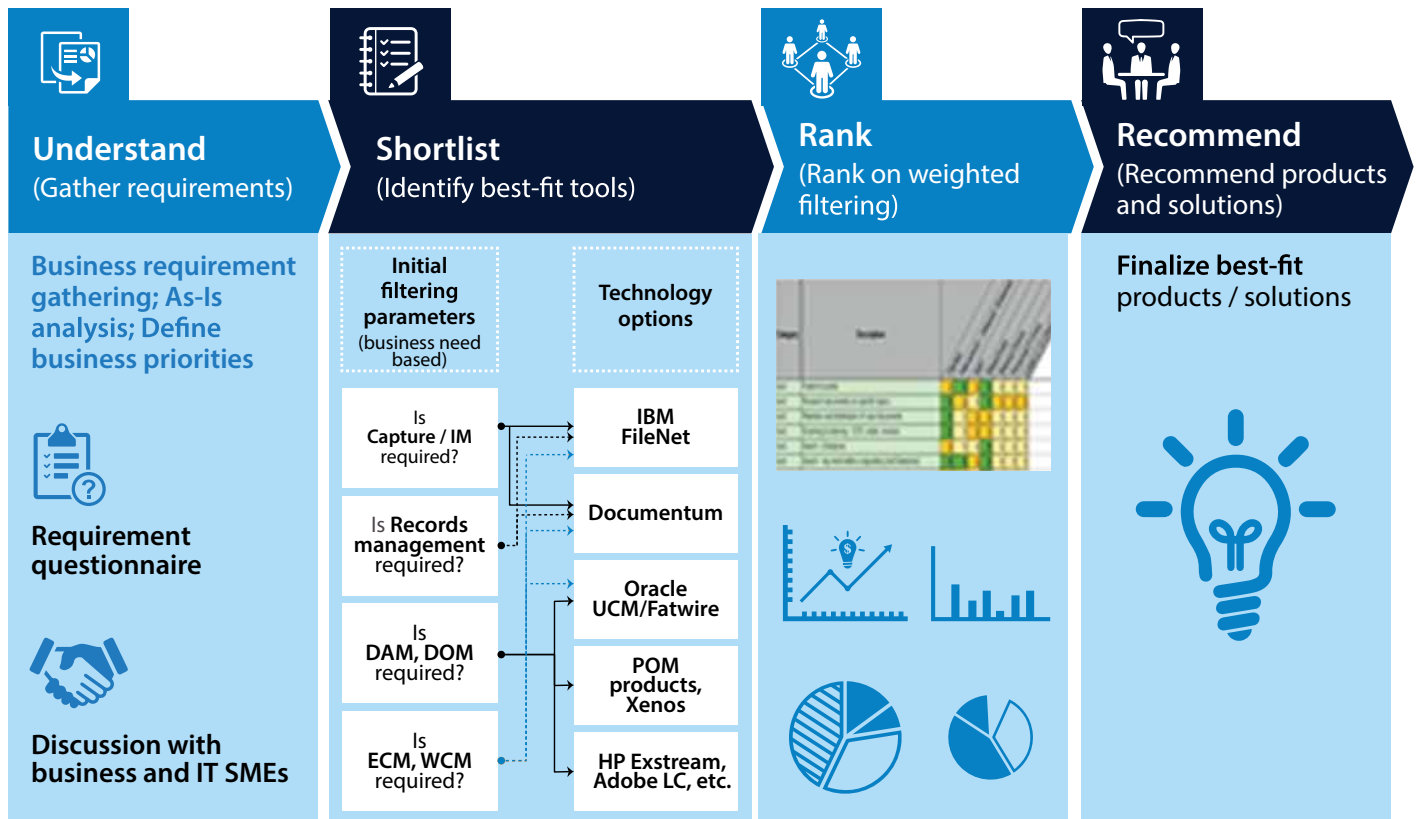
existing ECM and DOM practices within the organization for better performance and on the budget too.

Thorough analysis of the As-Is ECM landscape (if it exists already) and requirements of the customer are very much required in addition to the evaluation of the different products available in the market that are suitable for your customer's

specific needs.

The following guidelines are recommended for making the selection process more focused and streamlined for choosing the right ECM and/or DOM product(s) for the specific requirements.

Four key phases recommended to be followed for making the selection process more focused are:



Phase 1: Understand

Understanding the As-Is system and gathering the requirements

The first step to start the analysis should be to understand the current system (in case the customer already has a pre-existing ECM / DOM system), pain points, and future expectations of the customer in order to be able to analyze and recommend the best fit to-be solution to resolve current shortcomings.

Preparing the questionnaire

For better understanding of the requirements, it is important to prepare an exhaustive questionnaire that covers all the ECM and/or DOM segments to be covered as part of the scope.

The list of questions could be spread over the below major segments for any ECM and DOM system:

- Scanning, imaging, and ICR / OCR
- Document creation, DOM, and eForms
- BPM, workflows, and collaboration
- Correspondence management
- Library services
- Content classification
- Records management
- Content life cycle management
- Digital asset management
- Rights access management
- Search
- Reports management
- Presentation and publishing
- Multichannel delivery including mobility
- eDiscovery
- Integration with external subsystems
- Environmental setup
- eSignatures
- Governance

Each and every question in the questionnaire should have the option to clearly seek inputs from the users on the below three important areas.

- Functionality in current system (if applicable)
- Pain points (if any)
- Future system expectations (if any)

Conducting requirements workshops

Sharing the questionnaire with a wider audience and expecting a timely response from all of them over email might not be always effective. So, it is recommended to

organize detailed requirements workshops with different sets of users. In addition to receiving the responses to the questionnaire, having a workshop will help in exploring those areas as well as the questions that might have been missed in the questionnaire.

To plan requirements workshops more effectively, it is recommended to:

- Set up multiple workshop sessions to enable interaction with maximum number of stakeholders
- Invite stakeholders / users from different domains and roles involved
- Plan each workshop session with a clear agenda. This is required since the agenda for a workshop with top management or business decision makers would be totally different from the workshop organized for discussion with the technical IT staff and enterprise architects
- Share questionnaire with the invitees in advance so that they get enough time to gather the required information to be discussed during the workshop

Once the workshops with the users have been set up, it is more important to execute the sessions well, as you may not get another opportunity to touch base with the large number of stakeholders again during the entire assessment cycle. So, it is quite important to attend these workshops with complete focus and preparation so that you do not leave any scope for missing any important piece of information from the customer.

To execute requirements workshops more effectively, it is imperative to:

- Start with a small presentation about the segments (including industry-specific domains as well, if applicable) that are covered during the workshop. It provides a focused approach to the workshop in addition to enlightening the attendees about the topics to be covered in a particular session
- Take notes of important points discussed during the workshop. Using flip charts to make a note of the main points not only helps you in recalling the discussed points later but also ensures that the users

feel delighted to see that their points / suggestions are being taken care of.

- Present a summary of all those points that are already clarified beforehand to get an acceptance / confirmation from the participants.
- Make note of pain points of the current system as well as the expectations of the users from the future system. This helps in final recommendation.
- Audio / video record the workshops. It is always helpful for later perusal, however, you need to be extra careful with this approach. Depending upon the kind of audience and the industry culture, sometimes the stakeholders might not be comfortable telling the pain points of the current system and/or their expectations with the future system openly, knowing that they are being recorded. So, this approach can be used depending upon the situation.
- Presenting a summary of the main points discussed during each workshop definitely helps in building rapport with the customers, and ensures that all their concerns and inputs are being noted and taken care of in the future solution.



Preparing the As-Is state document

After successful workshop sessions with the users, it is time to consolidate the entire knowledge gathered from the sessions about the current ECM and DOM systems into the As-Is state document. In case there is no prior setup of ECM and/or DOM system in the customer premises and this is the first time they want to set up one, your document should include all the new requirements collected from the users during the workshops.

The below points should be taken care of while preparing the As-Is state document. The document should:

- Cover the current ECM / DOM landscape in detail clearly showing the inputs and outputs for each of the subsystems involved
- Throw light on the various domains involved in the organization with a description of the processes followed in each of them
- Include the pain points of the current system as mentioned by the users as well as those that would have been found during your analysis of the current system
- Also include the future expectations of users from the to-be system
- All the pain points and future expectations should be separately listed, i.e., the pain points should not be mixed with future expectations. This helps in analysis of the final product because your main focus is on removing the pain points of the current system first rather than providing some additional nice-to-have features, which are part of the future expectations
- Always categorize your pain points and future expectations into different segments like document creation and processing, BPM, DAM, security, integration, user experience / customer enablement, administration, multichannel input / output, deployment, support, advanced features (eSignatures / mobility), process improvement, governance, and so on. This helps you in analyzing the different products in the market to solve the current pain points and meet the future expectations too, related to that area.
- Each of the pain points and future expectations should be mapped to the relevant domain within the organization from where it has been reported. It helps to track and analyze the magnitude of pain and need for the change in different domains within the organization.

A well-documented As-Is system analysis report helps in winning customer confidence from the beginning itself and will definitely help in later stages of the assessment.





Phase 2: Shortlist Identify and shortlist the best-fit tools

Nowadays, hundreds of vendors are available in the ECM and DOM market space claiming to have best-of-breed products. So it is really a challenging task to pick the top few that suit your requirements.

In the shortlist phase, the relevant products should be shortlisted based on the below evaluation criteria. The shortlisted vendor / product:

- Addresses the key pain points in the As-Is system across domains
- Meets customers' future expectations and aligns with their global road map
- Market leader as per the latest Gartner's Magic Quadrant or Forrester's Wave report
- Provides offerings in various segments in the ECM / DOM space
- Should have experience and offerings in a specific domain (e.g., finance, education, healthcare, insurance, and so on). Depending upon your customer's domain, you can shortlist such domain-specific products
- Should have scalability to support future growth
- Includes different hosting options such as on-premise, software-as-a-service (SaaS), and cloud provided by the vendor
- Should have market receptiveness and proven track record
- Should have global presence
- Should have a future road map aligned with the latest trends in ECM / DOM space
- Should provide multichannel offerings including mobility, eSignatures, and so on (as required)
- Should support integration with other products or with some of the pre-existing applications
- Should have an open source product (if required)
- Should provide a framework for custom development, which might be required to meet some of the special requirements of the customer that are not readily available out of the box

Based on the above differentiating factors, you should be able to shortlist the top products according to your requirements.



Phase 3: Rank

Rank the shortlisted products on more detailed weighted matrix

After shortlisting the top products based on various factors, you need to rank them on various parameters in order to eventually find the best product meeting your customer's requirements.

Ranking top products

For ranking top 5–10 products, you need to prepare a list of parameters based on which a weighted ranking of different products is done. The set of parameters should be derived from the pain points and future expectations list that you had prepared earlier as part of Phase 1.

The various parameters can be divided into different categories depending upon your specific requirements, pain points, and future expectations.

Some of the key differentiating evaluation parameters to be considered are mentioned below:

- Search
- Taxonomy support
- User experience
- Security
- Integration
- Metadata management
- Scalability and setup
- Capacity planning
- REST-based architecture / SOA support and application programming interface (API)
- Multichannel input / output
- Deployment
- Licensing costs
- Business continuity
- Performance
- Federation
- eSignature
- Mobility
- Governance
- Platforms / hosting – Cloud / on-premise / others

After defining the various categories and parameters, it is time to define the criteria for ranking. The ranking criteria could also be custom-defined. Ideally, it should be a combination of the rating parameter and the priority / weightage of that parameter to address your pain point / expectation.

The rating criteria can be defined as per the below parameters:

Rating	Description
5	Supported Out of Box
4	Supported with configuration
3	Supported with customization using product API
2	Supported using custom development
1	Supported with third party products / connector
0	Not Supported

Similarly, the priority of a feature / parameter can be decided based on the following factors:

Priority	Description	Weightage
High	Required feature	3
Medium	Recommended feature	2
Low	Optional feature	1





Prepare Fit-Gap analysis report

Preparing a report (in some cases mandatory) to showcase the current system on various focus areas will help you understand which areas are already doing well and which components have gaps in their current implementation. Accordingly, you can focus on the selection of a new product for recommendation.

Gaps in the current system could be identified depending on the current industry standards in that particular focus area.

Some of the current industry best practices across various categories are:

ECM – Industry practices

- **Single repository** – Setting up a single repository for different kinds of documents helps organizations in better management of unstructured content. The repository can act as a single source of truth for all the information
- **Improved, faster, and flexible search** – In the ECM world, ability to retrieve the information is very important, hence adequate and advanced search features are being provided
- **Security** – It is imperative that all the documents are stored in a secured

manner with appropriate user access and permission

- **Collaboration** – There is a change in trend in organizations as people tend to work in a more collaborative manner. Current solutions provide ability for users to share the documents among themselves
- **Performance** – The system is set up in a manner to provide high availability and redundancy. This is achieved with current architecture definitions of ECM products
- **Business continuity** – To ensure the continuity of business in case of any disaster recovery, it is necessary to set up separate systems at different locations
- **Governance** – Proper governance practices are set up to ensure all the changes done to the application are executed in a well-defined manner

DOM – Industry practices

- **Template management** – Utilizes templates for presentation layout and defines standards for the documents
- **Data feed** – Populates values from different data sources for autofilling of values in the forms
- **Integration** – Integrates seamlessly with content management and business process management for end-to-end

forms handling

- **Authoring tool** – Users utilize a rich application with features, such as defining reusable components, drag-n-drop, and so on, for creating static and dynamic forms
- **Multilingual practices** – Forms are rendered in different languages and formats based on user preferences
- **eSignature** – Integration with eSignature solution for faster and efficient process turnaround involving different stakeholders
- **Dashboard capability** – Utilizes advanced reporting mechanisms such as business activity monitoring to provide at-a-glance reports and drill-down capabilities to easily manage batch jobs, view jobs, and analyze server statistics

eSignature – Industry practices

- **Accessibility** – Enterprises have implemented eSignature for various document formats to support users at multiple geographies and satisfy their location-specific needs
- **Compliance** – Solution adheres to the industry and regional compliance for financial / insurance / banking domains. Organizations choose a specific



compliance based on their business requirements

- **Configuration** – Organizations choose a specific eSignature type on the basis of business domains and legal acceptance. In accordance with this, product / solutions are configured
- **Integration** – Organizations implement eSignature to extend content and output management capabilities of products to provide end-to-end solutions. Leading ECM / DOM products available in the market provide tight integration with various eSignature products
- **Security** – Enhanced security and reduced risk comes with robust authentication options to protect data and content to the maximum extent possible
- **Traceability** – eSignature solutions support auditing capability to record actions taken on a document during the signing process

Mobility – Industry practices

- **Accessibility** – Enterprises have implemented mobility solutions for various document formats to support users of multiple devices and satisfy their location-specific needs

- **Compatibility** – ECM / DOM product vendors have established alliances with various mobile device vendors to provide compatibility for latest release of the hardware and operating system
- **Configuration** – Mobility solutions are configured to use responsive frameworks for rendering content in different formats based on the type of device used
- **Integration** – Organizations implement mobility solutions to extend content and output management capabilities of products in this space to provide an end-to-end solution. Leading ECM / DOM products in the market provide various mobility options
- **Multiplatform support** – Mobility solutions support devices and OS with low development and maintenance overhead
- **Security** – Mobility solutions satisfy organizations' security needs through enhanced features such as data encryption
- **Traceability** – Mobility solutions support audit trail capability to record different actions performed on a document

Customer engagement – Industry practices

- **Customer awareness** – Organizations implement robust campaign

management solutions to provide functionalities to customers such as promotions, newsletters, and so on, according to the need.

- **Social engagement** – Various enterprises depend on social media platforms to reach out to their customers and solicit feedback on their offerings
- **Multichannel output** – Information is offered to customers through digital touchpoints, such as mobile devices, kiosks, online, and other such points. Customers can consume and provide information through these channels
- **Customer enablement** – Organizations develop solutions to enable their customers with greater control over several activities such as payments, report generation, and checking past transactions.
- **Customer interaction** – Through the usage of latest technologies such as eSignature, customer transactions are concluded in an efficient and timely manner
- **Service customer** – Organizations implement solutions to provide services to customers in a time-efficient manner that results in a positive customer experience.

Phase 4: Recommend

Recommend products and solutions

After ranking the shortlisted products, it is time to recommend top products that meet the specified requirements.

Conduct vendor demos

To ensure effectiveness of the top-ranked products to satisfy your customers' expectations, it is recommended to organize the demos through top three vendors. The demos should focus on addressing the most important customer pain points / expectations.

A few other deciding factors to be covered during the demos are:

- ECM / DOM trends in specific sectors like finance, insurance, and manufacturing

- ECM / DOM case studies
- ECM / DOM product suite demos
- Solution deployment overview with high-level architecture
- Deployment options (hosting options like on-premise / SaaS / cloud)

The key business users should attend these demos to analyze different products and their offerings. It is recommended to obtain the feedback of the business users participating in the vendor demos. Their feedback itself will help analyze their interest in a particular product, which could eventually help in the final recommendation.

Prepare recommendation report

Now as you have already done your analysis, it is time to prepare the

recommendation report.

The recommendation report should be detailed and provide a clear understanding of the entire assessment done. As this document will be referred to by most of the stakeholders, it should contain a brief summary of each of the above stages so that it can serve as a single source of truth for everyone.

Depending upon the requirement, you need to depict the high-level architecture of the top three or a single product. A clear rationale along with the detailed cost-benefit analysis and a high-level project plan to implement and deploy the to-be system should be provided for recommending the set of products.

Conclusion

Please note that the above-mentioned steps are just some of the guidelines to assist you make better decisions in your journey to select the right ECM and/or DOM product for your organization. This should not be considered as the only formula / process to be followed toward the selection procedure. As every project is unique in itself and has a different set of requirements, you need to develop your own tailored approach based on the guidelines mentioned above, to implement the right solution.



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Harsh is a PMP-certified IT professional having more than 14 years of industry experience in consulting and management of ECM projects across geographies. As ECM consultant, he has successfully played various key roles in leading enterprise-wide implementations for several Fortune 500 clients across sectors. His strength lies in solution scoping, estimation, budgeting, project management, proposal preparation, architecture, and go-to-market plans for various verticals with sound technical and delivery background.

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