

Enterprise Content and Records Management (ECRM) Planning Services

Gimmel Group's planning and strategy services enable some of the world's largest global organizations to justify, plan, and realize the benefits of Enterprise Content and Records Management (ECRM) solutions. ECRM programs are typically driven by executive management and corporate counsel to reduce the cost and risk associated with their electronic records management practices. Key areas of pain include the cost of eDiscovery, and compliance along with concerns about the effectiveness of electronic records management, its linkage to business strategy, and the role of Microsoft SharePoint 2007 in an ECRM program.

The Approach

Gimmel Group analyzes existing ECRM program elements against best practices. We have defined a comprehensive approach that allows us to rapidly evaluate an organization across five areas: Business Foundation, Technical Foundation, Governance, Program Management, and Operations. Our approach is broken into phases that include: Assess, Define, Implement, and Cultivate. This ECRM Planning Roadmap is included on the last page of this brief for reference. All unstructured electronic content (documents, email, collaboration sites, instant messaging, images, web content, maps, engineering drawings, technical specifications, Excel spreadsheets, reports, etc) may be included in scope along with backup files and tapes, shared drives, and paper files.

Getting Started with an Assessment

During the initial phase of Assessment we typically find that a client will have varying degrees of progress in each of the five general areas. Taking a comprehensive look across these areas allows our team to define gaps and next steps toward implementing the overall program.

Our work in Governance reviews enterprise policies and guiding principles against alternative practices and approaches to ensure effectiveness. This includes records policies and retention plans.

The Business Foundation work identifies key business drivers, high level requirements and program economics. An opportunity matrix for ECRM with identified priorities is developed.

The Technical Foundation work evaluates the existing IT architecture and produces an As-Is and To-Be ECRM reference architecture along with an ECRM technology roadmap. The implementation of an ECRM Reference Architecture enables our clients to designate a standard set of technologies and processes to manage the information and knowledge contained in enterprise content repositories. The goal of the Reference Architecture is to establish the role of all technologies, minimize disparate components, maximize integration, and enable automated classification of records to the greatest extent possible.

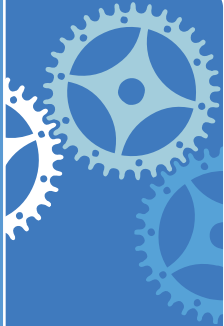
The Program Management work looks at project qualification criteria and produces a project portfolio and high-level program plan and costs along with the initial

GIMMAL CLIENTS

ABN AMRO
Adtran
Aker Kvaerner
Albertsons
Alcon Labs
Alliance Atlantis
Amerada Hess
American Bible Society
American Electric Power
American Heart Association
Anadarko Petroleum
Archon
Army Air Force Exchange Service
Ashmore Energy
BP
Baker Hughes
Booz Allen Hamilton
Brass LNG
Burlington Resources
Calpine
Carnival Cruise Lines
Chevron
ChoicePoint
CitiFinancial Japan
Constellation Energy
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**GIMMAL CLIENTS
(Continued)**

- Devon Energy
- DynMcDermott
- EMC
- Employee Benefit Solutions
- Energy Transfer
- ExxonMobil
- First Health
- Guaranty Financial Services
- Harley Davidson
- Hexion Chemical
- Hines Interests
- Home Depot
- J. Ray McDermott
- Keane
- Kimberly-Clark
- Kvaerner
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requirements for ECRM training and on-going support. Program Management includes qualification, planning, analysis, oversight, and implementation services for the full portfolio of ECM projects. It is focused on project delivery.

ECM Operations looks at the current organizational state and provides recommendations for the effective operation of a program. ECM Operations is the ongoing staffing, management, and support needed to ensure the ECM Strategy Roadmap can be executed and sustained. This is staff-focused.

At the conclusion of the Assessment phase, Gimmel provides management briefing and business case documentation describing the ECM Strategy Project findings, conclusions, and recommendations to move forward into the Define phase of the program.

Gimmel Group Differentiators

Gimmel Group has deep expertise implementing Enterprise Content and Records Management systems. Our program planning is grounded in the knowledge of what can be done with technology to improve electronic records management, unify physical records management, manage email and improve business processes through years of implementing these systems.

To complement our services, we have created a set of tools called the *Gimmel Works Enterprise Requirements Analysis Framework*. This Framework includes a web-based survey and reporting tool that provides empirical data to validate business drivers, prioritize where solutions should be implemented, speed the implementation and enhance the success of large ECRM programs. We use the Requirements Analysis Framework to develop an ECRM Project Strategy that demonstrates how to:

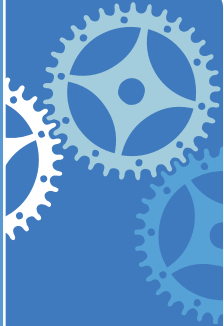
- Describe the current business process usage of documents and produce a content usage model
- Identify opportunities for ECRM Applications
- Identify and describe
 - Potential compliance gaps
 - Change Management needs

We assess the current state of user access to documents to identify opportunities to achieve the following objectives:

- Define the high level requirements for better-managed and more accessible document repositories
- Define initial requirements for improved records management and more cost effective search capabilities
- Define the initial requirements for an enterprise-wide document taxonomy
- Define the initial requirements for the archival of email and instant messages

The Benefits

Gimmel clients are able to leverage years of Best Practices experience and tools development to accelerate the implementation of an ECRM strategy throughout the organization. Gimmel provides different models of business justification, from process improvement to risk avoidance to legal and regulatory compliance. Gimmel also



provides different approaches to align the organization behind a single strategy. These approaches include alternative organizational structures, training and change management programs, and a unified ECRM reference architecture strategy.

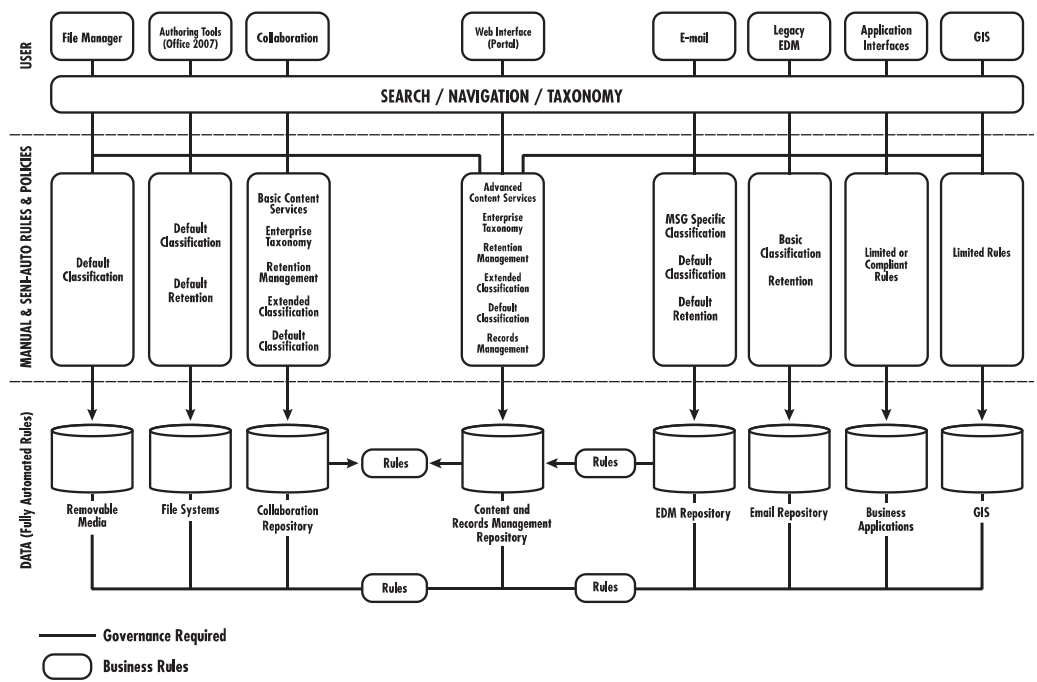
The Punch Line

With remarkable frequency, our large clients are trying to solve the problem of records management across multiple repositories of electronic content, including email, file shares, MOSS 2007, and an enterprise-scale ECRM repository. We have worked with five Fortune 100 organizations to solve this problem. We can help you solve this problem in your organization with our ECRM content usage model and work to define successful electronic information lifecycles.

GIMMAL CLIENTS (Continued)

- Pearson Education
- Reliant Energy
- Service Corporation Int'l
- Shea Homes
- Shell Trading
- Software Innovations
- Solvay
- Southern Company
- Swiss Reinsurance
- Temple-Inland
- Texas Dept. of Transportation
- United Space Alliance
- University of Texas Health Science Center
- University of Texas Psychiatric Center
- U.S. Dept. of Energy
- WalMart
- Waste Management
- Watson Wyatt

Gimmel | ECRM Usage Model



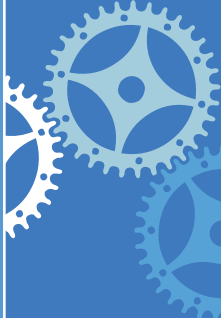
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ECM Program Planning Road Map

SOLUTION BRIEF



	Governance	Business Foundation	Technical Foundation	Program Management	ECM Operations
Assess Phase	Policy Enterprise Policies Guiding Principles	Business Drivers Economics/CBA Information Gathering Guidelines & Tools Information Gathering Results Opportunity Matrix Project Prioritization	As-Is ECRM Reference Architecture To-be ECRM Reference Architecture ECRM Technology Roadmap	Project Qualification Criteria Project Portfolio High Level Program Plan	As-Is ECRM Operations Analysis Recommended Organization Structure
Define Phase	Enterprise Records Retention Schedule Metadata and Taxonomy Standards Security Standards Operating Models Litigation Hold Process Statements of Direction	Identified Use Cases Usage Patterns Baseline ECM Functional Requirements	Solution Type Profiles RFI's, RFP's Procurement Support ECM Infrastructure Product Selection Updated Technology Roadmap	Program Budgeting ECRM Infrastructure Implementation Plan Updated Project Portfolio Program Schedule Risk Management	Staff Management & Capacity Plans Communication Plans Recommended Organization Initiated
Implement Phase	Operating Procedures Enterprise Awareness & Training Compliance Assessment Plans	Validate & Update Use Cases & Usage Patterns Validate & Update Baseline ECRM Functional Requirements	To-be ECRM Reference Architecture Implemented Updated ECRM Technology Roadmap	Migration Plans Individual Project Charters Individual ECRM Solution Deployments ECM Integration Plans ECM Program Performance Reporting	ECRM Organization Structure Established Systems Support
Cultivate Phase	Compliance Assessments Compliance Reporting Continuous Improvement Enterprise Awareness & Training		ECRM – New Product Capability Analysis Updated Technology Roadmap	Remaining ECRM Solution Type Deployments ECRM Program Performance Reporting ECRM Specialization	Organization Structure Streamlined Systems Support Benefits Realized

About Gimmel Group

Gimmel Group is a leading professional service firm offering a focused range of information technology services. We help the world's leading companies improve business performance and compliance through the effective planning, implementation and integration of: Enterprise Content & Records Management, Geographic Information Systems, and Web Design & User Experience.

For More Information

To learn more regarding the Enterprise Content Management Framework, contact Gimmel Sales at 713-586-6500 or sales@gimmel.com.

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