

## 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.

### 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  
(Continued)

### CONTACT US

Gimmel Group, Inc.  
24 Greenway Plaza,  
Suite 1000  
Houston, Texas 77046  
Tel 713.586.6500  
Fax 713.586.6501  
gimmel.com

### 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

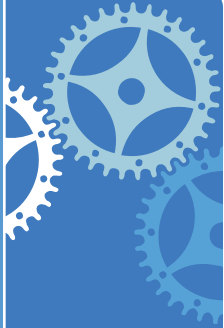
During the initial phase of Assessment we typically find that a client will have varying degrees of progress in each of the five general areas. Taking a comprehensive look across these areas allows our team to define gaps and next steps toward implementing the overall program.

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 (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:

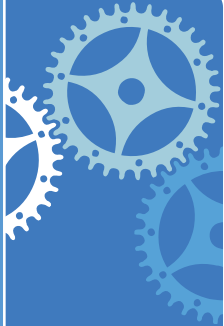
- Describe the current business process usage of documents and produce a content usage model
- Identify opportunities for ECRM Applications
- Identify and describe
  - Potential compliance gaps
  - Change Management needs

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



**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

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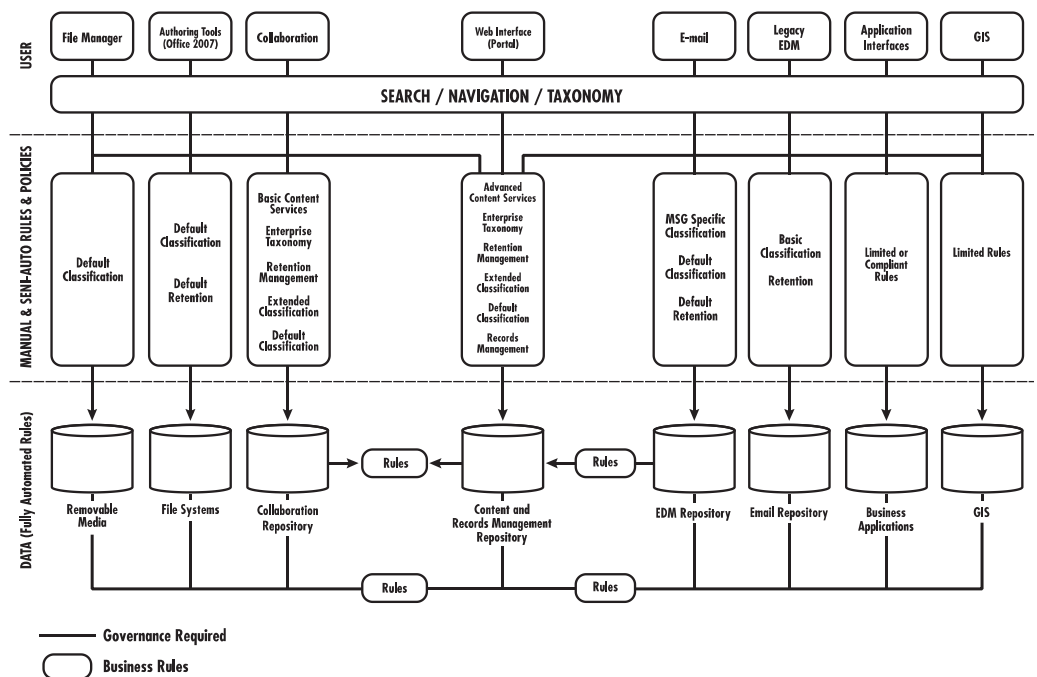
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 Fax 713.586.6501  
 gimmal.com

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.

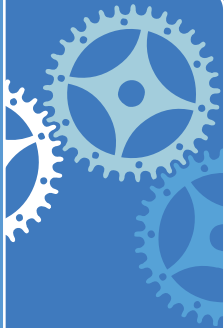
**Gimmal | ECRM Usage Model**





## ECM Program Planning Road Map

SOLUTION BRIEF



	Governance	Business Foundation	Technical Foundation	Program Management	ECM Operations
<b>Assess Phase</b>	<ul style="list-style-type: none"> <li>Policy</li> <li>Enterprise Policies</li> <li>Guiding Principles</li> </ul>	<ul style="list-style-type: none"> <li>Business Drivers</li> <li>Economics/CBA</li> <li>Information Gathering Guidelines &amp; Tools</li> <li>Information Gathering Results</li> <li>Opportunity Matrix</li> <li>Project Prioritization</li> </ul>	<ul style="list-style-type: none"> <li>As-Is ECRM Reference Architecture</li> <li>To-be ECRM Reference Architecture</li> <li>ECRM Technology Roadmap</li> </ul>	<ul style="list-style-type: none"> <li>Project Qualification Criteria</li> <li>Project Portfolio</li> <li>High Level Program Plan</li> </ul>	<ul style="list-style-type: none"> <li>As-Is ECRM Operations Analysis</li> <li>Recommended Organization Structure</li> </ul>
<b>Define Phase</b>	<ul style="list-style-type: none"> <li>Enterprise Records Retention Schedule</li> <li>Metadata and Taxonomy Standards</li> <li>Security Standards</li> <li>Operating Models</li> <li>Litigation Hold Process</li> <li>Statements of Direction</li> </ul>	<ul style="list-style-type: none"> <li>Identified Use Cases</li> <li>Usage Patterns</li> <li>Baseline ECM</li> <li>Functional Requirements</li> </ul>	<ul style="list-style-type: none"> <li>Solution Type Profiles</li> <li>RFI's, RFP's</li> <li>Procurement Support</li> <li>ECM Infrastructure Product Selection</li> <li>Updated Technology Roadmap</li> </ul>	<ul style="list-style-type: none"> <li>Program Budgeting</li> <li>ECRM Infrastructure Implementation Plan</li> <li>Updated Project Portfolio</li> <li>Program Schedule</li> <li>Risk Management</li> </ul>	<ul style="list-style-type: none"> <li>Staff Management &amp; Capacity Plans</li> <li>Communication Plans</li> <li>Recommended Organization Initiated</li> </ul>
<b>Implement Phase</b>	<ul style="list-style-type: none"> <li>Operating Procedures</li> <li>Enterprise Awareness &amp; Training</li> <li>Compliance Assessment Plans</li> </ul>	<ul style="list-style-type: none"> <li>Validate &amp; Update Use Cases &amp; Usage Patterns</li> <li>Validate &amp; Update Baseline ECRM Functional Requirements</li> </ul>	<ul style="list-style-type: none"> <li>To-be ECRM Reference Architecture Implemented</li> <li>Updated ECRM Technology Roadmap</li> </ul>	<ul style="list-style-type: none"> <li>Migration Plans</li> <li>Individual Project Charters</li> <li>Individual ECRM Solution Deployments</li> <li>ECM Integration Plans</li> <li>ECM Program Performance Reporting</li> </ul>	<ul style="list-style-type: none"> <li>ECRM Organization Structure Established</li> <li>Systems Support</li> </ul>
<b>Cultivate Phase</b>	<ul style="list-style-type: none"> <li>Compliance Assessments</li> <li>Compliance Reporting</li> <li>Continuous Improvement</li> <li>Enterprise Awareness &amp; Training</li> </ul>		<ul style="list-style-type: none"> <li>ECRM – New Product Capability Analysis</li> <li>Updated Technology Roadmap</li> </ul>	<ul style="list-style-type: none"> <li>Remaining ECRM Solution Type Deployments</li> <li>ECRM Program Performance Reporting</li> <li>ECRM Specialization</li> </ul>	<ul style="list-style-type: none"> <li>Organization Structure Streamlined</li> <li>Systems Support Benefits Realized</li> </ul>

### 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](mailto:sales@gimmel.com).

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Gimmel Group, Inc.  
 24 Greenway Plaza,  
 Suite 1000  
 Houston, Texas 77046  
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 Fax 713.586.6501  
[gimmel.com](http://gimmel.com)