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Enterprise Capture Systems in Business Process Improvement

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In today's competitive environment, leading corporations are continuously reinventing themselves in the pursuit of value throughout the value chain. Whether in relation to human resources, operations, sales, legal or other functions, managers seek systems that increase the efficiency of and decrease non-compliance with processes and policies. Failure to access information in a timely fashion is often due to flawed business processes: for example, employees fail to file or update documents appropriately, and managers neglect to share information.

An ECM system captures institutional knowledge, permits seamless availability and flow of reliable information, and empowers employees to work more effectively. It may be considered the common denominator of other management systems; it is the backbone that can be relied upon as other management systems are built up around it, thus enabling informed decision-making.

While it used to be merely desirable for a company to have an Enterprise Content Management (ECM) system, it is now a necessity because these systems provide significant competitive advantages. Similarly, in the Oil and Gas industry, management systems for health and safety, environment and quality management were formerly merely worth having, but now companies cannot operate without them. In our opinion, ECM systems have tipped from being merely attractive to absolutely essential.

One of the most important and visible steps of ECM, capture, is critical to business process improvement. In this paper, I highlight the key points and advantages of

enterprise capture, as informed by EnergyConsulting's ECM engagement experience. Additionally, I dispel misunderstandings on capture and mention leading capture product providers.

Opinions on capture for enterprise content are polarized into two camps: those with experiences of ECM and those without. In companies where a system has not yet been implemented or even considered, managers make numerous assumptions in the belief that document capture will be followed by trouble-free adoption of ECM methods throughout the whole company. Conversely, managers of companies in which ECM is underway understand the complexity of proper implementation and thus realize there is no magical diffusion of ideas: rather there is only rigorous planning and training. Capture unfortunately exemplifies the belief of the uninitiated that deployment is easily done.

Capture refers to scanning business documents, including structured and unstructured content. Structured content refers to business forms, which, according to leading consultancy Gartner, are required for 85% of business processes. Unstructured content refers to, among others, Word documents, spreadsheets, email messages and photographs. Devices that achieve capture include digital cameras, desktop scanners, camera-phones and tablet computers (e.g. iPad).

Organizations should ensure that the file format of captured documents is standardized throughout: TIFF4 is currently the *de facto* standard at many companies but we recommend that files be saved as searchable PDF. The reason is that PDF files can effectively serve as a starting point for training staff in an overarching enterprise content strategy. Knowledge workers' and administrative staff's familiarity with the benefits of PDFs can be utilized in motivating them to adopt the practices and processes of an ECM system, including appropriate usage and application of metadata and taxonomies.

An enterprise capture system should be deployed in stages with the buy-in of the majority of staff. A 'big bang' approach is inadvisable because employee resistance will inevitably be amplified. A top-down approach with leading executives spearheading ECM projects has demonstrated particular effectiveness. Managers need to inculcate an environment in which workers want to capture documents so it is imperative to demonstrate that the system leads to simplification of workloads for end users, and

processes for the whole firm. Searching and discovering times are shortened and productivity is increased.

Throughout organizations in our knowledge-driven society, the adage "Information is power" has become a truism. When certain staff closely hold knowledge they have obtained without sharing it across the organization, they are essentially engaging in value destruction; their misguided attempts at a power play negatively impact the organization's efficiency and morale. When an ECM system is introduced, such negative moves are much less likely to occur, adding support for such a system's introduction.

In an efficient management system, knowledge assets and institutional memory are made available to the workforce, subject to access rights. An additional benefit of searchable documents is the empowerment of staff who are motivated to access. The positive feedback continues apace as the firm's knowledge assets grow in quantity and quality, thus adding value to the company. Each year, when fresh cohorts of young graduate recruits join organizations, they bring a tech-savvy approach that has minimal reliance on paper-based knowledge databases and information flows.

Misunderstandings about capture are numerous among those unfamiliar with the concept. From our experience at EnergyConsulting, many managers mistakenly believe that an enterprise capture strategy is a matter of workers scanning documents at great time and expense. Additionally, other managers fail to understand that training sessions should be carried out to ensure that the corporate culture is morphed into one in which enterprise capture systems are the norm. Yet others believe that a return on investment is achievable even without thorough training.

EnergyConsulting has experience w ith many of the leading capture products, including those from, *inter alia*, Adobe, EMC, IBM, Xerox, and Knowledge Lake (our analysis of those products will be the subject of a later paper). Following our implementations, we have observed that improvements in business processes are attributable to ECM systems and therefore to capture systems.

In conclusion, capture, when implemented appropriately as part of an ECM system, will result in measurable business improvements. Further, when buy-in is obtained from the organization leaders, a top-down approach is effective in incrementally adding value throughout the value chain.