

Expansion Readiness Scorecard

Assess your readiness to move forward with enterprise content and information management expansion

Please answer each question (front and back of the scorecard) for evaluation in the workshop. For each answer, write the corresponding score value in the Score column, and then calculate the total scores of each section. For example, if the answer to question 1. in the Sponsorship section is yes, your score is 5.

1: Sponsorship		1	2	3	4	5	Score
1.	We have a defined vision for what ECM (i.e. your Hyland solutions) can provide the organization & is transparent to the user body	No	I think so	Defined, not transparent	Yes, but not supported	Yes	
2.	There is a clear understanding of where ECM sponsorship exists	No	Yes, at a department level			Yes	
3.	Sponsors are committed & vested in the program (not only at the start/finish)	No	Not sure	I think so	Committed at the start	Yes	
4.	A steering committee exists & is devoted to the ECM effort at the organization (they meet on a regular basis)	No		Yes, but not ECM-focused		Yes	
5.	Executives understand what ECM is & how it can improve productivity	No	Not sure	Only for current solutions	Yes, but limited	Yes	
6.	Competing ECM systems do not exist within our infrastructure	4+ systems	3 systems	2 systems	1 system	None	
						Total Score:	
2: Team		1	2	3	4	5	Score
1.	We have a dedicated team that exists to support the ECM program with well-defined roles (ECM Administrator vs. Project Manager vs. Analyst)	No	1 – 2 people	1 – 4 people, 5+ systems	1 – 4 people, 2 – 4 systems	Yes	
2.	The organization has skilled resources and supporting components to maintain ECM security measures	No		Somewhat		Yes, solid	
3.	The core ECM team for the organization attends training regularly (Community, Classes, Discussions, Tech Support, etc.)	No	Once per year	Once per quarter	Once per month	Almost weekly	
4.	All core ECM team members and sponsors have Hyland Community accounts (and use them frequently)	No	Yes, once per year	Yes, once per quarter	Yes, once per month	Yes	
5.	Employees have an understanding and are educated about ECM	No		Some departmental users		Yes	
6.	A formalized training plan exists (and is updated regularly) for ECM users across the organization	No	On the job specific training	General training once hired	When a large change is pushed	Yes, many options and self-service	
						Total Score:	
3: Infrastructure		1	2	3	4	5	Score
1.	There is a support system for every project we roll out for ECM	No	If we have time	Only for large projects	For most projects	Yes, it's a standard	
2.	We have appropriate environments to support the ECM system (minimum of DEV, TEST, PROD)	PROD only	PROD and DEV	We have multiple installs	PROD, DEV, TEST	PROD, DEV, TEST, TRAIN	
3.	A backup and DR site (disaster recovery) exist to support the ECM product	No		Yes, one exists	Yes, both	Yes, both and we check them on a regular basis	
4.	A formal structure for document retention and disposition exists within the organization	No	It does, but needs interpretation	Yes, and we know what is needed	Yes, and we execute against it	Yes, and we use ECM for it	
5.	A formal enterprise taxonomy (classification schema) exists and is reviewed and updated regularly for our ECM system	No	Each department has their own	Yes, but we only discussed it once	Yes, and we add to it regularly	Yes and we collectively review and control it	
6.	The current infrastructure has the capacity to support long-term growth of ECM solutions (and are reviewed regularly)	No	Not sure	Yes, for the immediate futures	Yes, we plan to review it before expanding	Yes and we review it every 2-3 years	
						Total Score:	

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4: Alignment and Prioritization		1	2	3	4	5	Score
1.	ECM is considered a critical system for our organization (similar to a core or line of business system)	No	Only for a select solution	Yes, for 1 – 4 departments	Yes, for 4+ departments	Yes, similar to an ERP	
2.	A formal structure exists for classifying content in ECM (valid, correct, appropriate/missing keywords, etc.)	No	Each department has their own	Yes, but we only discussed it once	Yes, and we add to it regularly	Yes, and it's controlled enterprise-wide	
3.	The organization has clear goals and objectives for what it wants to achieve with ECM – including how success will be measured	No	Each department does it their own way	Yes, but only for some projects	Yes, and we evaluate it regularly	Yes, and it's controlled enterprise-wide	
4.	The work done by the organization for ECM fits and aligns with other objectives/projects	No	Each department does it their own way	Yes, but only for some projects	Yes, and we evaluate it regularly	Yes, and it's controlled enterprise-wide	
5.	The organization has clear indicators by which it evaluates and measures ECM project priorities	No	Probably in some departments	Yes, but only for some solutions		Yes, and we make sure ECM is leveraged	
6.	An ECM long-term roadmap (3+ years) exists and includes tactical and measurable results	No	We know we should and see the value in it, and are planning to develop one	We have a roadmap but it's limited to what we know	We have a really good understanding and have developed one ourselves	Yes, Hyland helped us develop one!	
						Total Score:	
5: Process		1	2	3	4	5	Score
1.	Multiple, independent business applications (spreadsheets, databases) that support ECM documents (tracking, ticklers) exist in our organization	Yes	Good question, we have not evaluated this	Yes, they are rampant	Yes, but we are migrating off of them	Very limited, we try to align as much as we can with ECM	
2.	Key business processes are well-understood (or have been mapped out) in the past 36 months	No	We have done this in the past for a specific department or process, but have not updated	We have done this in the past for the enterprise, but have not updated	We do this on a regular basis across for specific departments or processes	We do this on a regular basis across the organization	
3.	Content that exists in key business processes is ready for ECM (not outdated, easily decipherable/manageable in paper form)	No	Probably in some departments	Yes, but only for some solutions		Yes, and we make sure ECM is leveraged	
4.	The organization has seen success with our Hyland ECM product	No	1 – 2 solutions	3 – 6 solutions	6 – 10 solutions	Yes, 10+ solutions/enterprise wide	
5.	There exists a change management system in place to support enhancements, projects and features for the Hyland ECM product	No	Only as needed	Yes, some departments do this regularly	Yes, we have a Change Management team but they don't support ECM	Yes, we have a Change Management team that supports ECM	
6.	All key business processes leverage electronic tasks and work management through our Hyland ECM product	No	We use it for 1 – 2 solutions	We use it for 2 – 5 solutions	We use it extensively, have many solutions in 1 – 2 departments	Yes, we make a point to try and leverage ECM for this across the enterprise	
						Total Score:	
						Final Score (Sum of all Section Totals)	

Thank you for filling out this scorecard in preparation for our interactive workshop.

Please remember to have this available for the webinar, as we will use the total scores in each section to help drive the workshop. Note that not all questions will be discussed in detail during the webinar, however, general recommendations per section will be provided along with tactical next steps for keeping expansion efforts moving forward.