How to Succeed at Mobile Content Management

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Right now, many organizations are planning to dramatically increase their use of mobile-enabled content management (MCM) — providing document management, imaging, workflow and other ECM capabilities to folks using mobile devices. Let's look into how to select, plan and roll out your MCM opportunities.

There are 4 General Kinds of MCM Applications

The expansion in MCM usage is in several dimensions: from smaller to bigger deployments, simple to complex applications, and lower value/risk processes to higher value/risk processes. It's important to understand the implications of these shifts. To make it easy, let's focus on size and complexity and assume that increased value and risk comes with increases in size and complexity.

This results in four very general categories of MCM deployments: small-simple, big-simple, small-complex and big-complex. These are very different kinds of applications and deployments:

- A mobile deployment giving 100 employees viewing rights to documents on shared drives or an ECM system is very different than giving 10,000 internal folks and 1,000 external folks those same simple capabilities. The first is small-simple while the second is big-simple.
- Giving a CEO and her peers the ability to view the agenda and materials for an upcoming board meeting is very different than giving a mobile-enabled board meeting agenda management authoring/review/approval solution. The first is small-simple while the second is small-complex.
- Giving employees or customers the ability to use their phones and tablets to capture expense receipts or checks is very different than providing ingestion capabilities of trailing and other documents in a financial services loan application process. The first is small (or big) simple while the second is small (or big) complex.

These are all very different kinds of applications and I recommend that you try to bucket your opportunities into those categories. Different organizations need different types of MCM applications, and if you're a larger organization, you may need all 4 types of applications (small-simple, big-simple, small-complex, big complex).

This is a big deal because most of the technologies and approaches that are good for small and simple can't scale to big or address complex content, workflow, and other ECM requirements. And conversely most of the technologies and approaches that may be good for big and complex are overkill for small and simple — and their costs and risks will swamp any benefits you might have gotten.

How to Get Big and Complex

Let's get more specific about how to increase size and complexity in MCM — and explain how you should plan your rollout to yield benefits at each step while controlling the considerable potential costs and risk.

One obvious way to get bigger is by adding more participants — getting more people to engage in your processes. And you can get more complex by doing more advanced or specialized activities with content management or with process management (workflow or BPM — the design, orchestration and execution of processes to get stuff done).

So if we're talking about increasing the size and complexity of mobile ECM we can do so by dialing up any or all of the three dimensions (participation, content or process):

1. Adding mobile capabilities within the enterprise or in larger and larger circles outside the enterprise
2. Adding any level of mobile capabilities to any level of CM complexity — where the levels of CM complexity range from simple file viewing to advanced content management, from simple "content consumer capabilities" to advanced and specialized "content contributor capabilities" involving authoring, editing and capture
3. Adding any level of process management capabilities to the other two dimensions — from no workflow, to routing, to document workflow, to very complex workflow involving case management and intricate creative decisions.

Take Only One Step at a Time - in Any of the Three Directions

Now here's an effective starting point for planning your roadmap for mobile-enabling ECM. I recommend that you do the following:

1. Identify the current state of your candidate opportunities and select one to address first.
2. Determine what that application would look like under ideal conditions. If your budget were unlimited, what kind of mobile, content management and process management capabilities would it have?
3. Now inject the constraints imposed by reality and determine what your realistic target state should be for that application (given your budget, risk tolerance, etc.).
4. Then close the gap between your current state and your target future state — but take only one step at a time. Think of it as a game where you can only move one step in any of the three dimensions per turn.

So for example if you want to enable sales folks to view sales documents and create proposals in the field, you should determine where you are. Determine the best state and your realistic target state. Then get there incrementally in steps.