

# CONQUERING THE CHALLENGES OF USER ADOPTION IN ECM

## ADOPTION IS AT THE CORE OF ROI

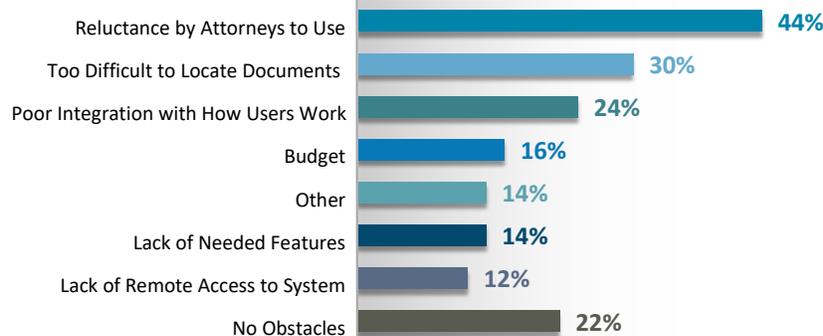
The promise of content management systems to capture and organize work product continues to be an attractive prospect to legal organizations, as shown by these systems' growing presence within law firms and corporate law departments. Most legal organizations now have system-based ECM in place. Additionally, a majority of those organizations plan to increase their investment in content management in the short- to mid-term.

Yet for legal organizations in the process of implementing new technology solutions, we're all so painfully aware of the challenges of adoption and motivating users to use this new technology effectively. This challenge lies at the core of realizing a strong return on investment.

## A LEGACY OF OBSTACLES

Historically, many of these adoption obstacles have often hinged on letdowns by system itself, especially as they relate to *user experience* (Fig. 1 below). Users, these days, expect an experience that jives with and complements their ingrained work routines, and often the simplest, often overlooked, factors, such as searching for their matters, can derail a new deployment. Other difficulties with adoption have had more to do with simple human apathy, such as attorney reluctance.

Fig. 1 | OBSTACLES TO USER ADOPTION



Ironically, the ease of use of local and shared drives, email, personal file sharing services, or even the old standard, redwell folders, enables the continued recalcitrance of attorneys to use content management systems. Unfortunately, this use paradigm is dangerous. As users create their own quasi-content environments – ad hoc and haphazard – they expose their organizations to a higher degree of professional and legal risk. Hence, risk mitigation and the need for centralized, secure content repositories continue to serve as primary drivers for more sophisticated and transparent system use models.

**RISK MITIGATION AND THE NEED FOR CENTRALIZED, SECURE CONTENT REPOSITORIES CONTINUE TO SERVE AS PRIMARY DRIVERS FOR MORE SOPHISTICATED AND TRANSPARENT SYSTEM USE MODELS.**

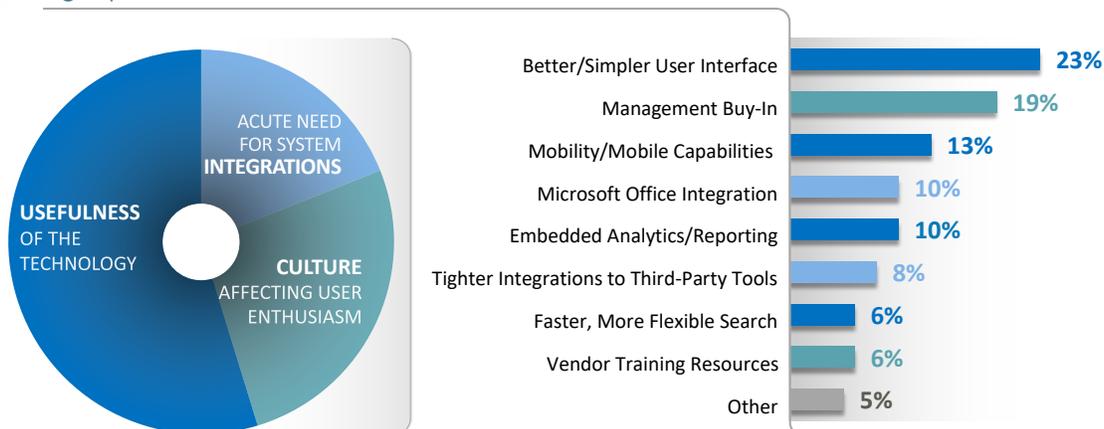
**IN ORGANIZATIONS WHOSE LEADERSHIP IS IN AGREEMENT TO LAUNCH—AND ENFORCE THE USE OF—THESE SYSTEMS, USER ADOPTION HAS A “STICKINESS” THAT IS RARELY ACCOMPLISHED OTHERWISE.**

In the language of one expert we engaged, the cure for “ECM avoidance” is to create “easy ECM” that requires little-to-no training, piggy-backs the ECM experience on the systems users already know and use and can draw user adoption with a lower expenditure of institutional energy.

## OVERCOMING THE OBSTACLES

How, then, does one overcome the obstacles that can make user adoption of ECM systems such an institutional challenge? In other words, what aspects of a system offering can flip the script, so to speak, and turn recalcitrance into acceptance—and even eagerness? Opinions on the matter are often strong and passionate, and one industry insider recently framed the industry’s sentiments quite adeptly: “Without the promise and the delivery on the promise to make work better, simpler, more fun... and fulfillment of that promise by the product, it is going to be an uphill battle and require a lot of reminders and ‘babysitting’ by the first line manager.” The search for this “secret sauce” for user adoption lies at the heart of recent benchmarking by Hyperion Research on contributors to legal technology adoption. As **Fig. 2** below demonstrates, legal technology managers and administrators agree on **three fundamental keys to user adoption**:

**Fig. 2 | MOST SIGNIFICANT CONTRIBUTORS TO USER ADOPTION**



## CULTURE AFFECTS USER ENTHUSIASM

With nearly one in five managers pointing to the need for management buy-in, the focus on clear objectives and goals by management is essential to software adoption. An organization without a top-down mandate for transformation will likely struggle to adapt actual every day activity. In organizations whose leadership is in agreement to launch—and enforce the use of—these systems, user adoption has a “stickiness” that is rarely accomplished otherwise. An important factor to that effort starts with the system selection process itself.

Management needs to carefully assess the needs of attorneys, staff and other legal professionals—truly seek to understand the way people perform their work—and select software and tools that best support those values. The organizational business objectives that drive the need for technology in the first place can best harness genuine momentum by being thoughtfully aligned with meaningful improvements to “on the ground” ways of working.

## ACTUAL USEFULNESS

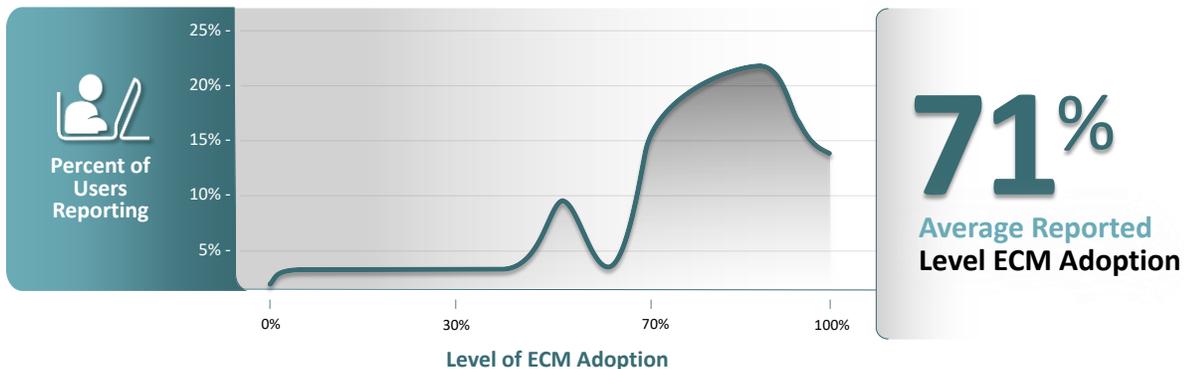
Most of the opinions in our benchmarking on adoption are dominated by factors related to **actual usefulness** of technology solutions. An array of features that actually support people in how they do their jobs in and out of the office, they include highly tactical factors such as the User Interface, Mobility, Search, Analytics and Reporting, and Microsoft Office integration. Independently, these features ostensibly support faster, better, more accurate and more seamless work. As we evaluate them in the aggregate, though, we begin to understand the multi-faceted dimensions that comprise true information management transformation. This is especially important as data-driven decision-making—and the sources and the quality of the data that enter the critical path—begin to drive operational maturity.

Legal professionals, as part of their user needs analysis, need to work to ensure both **actual usefulness** and **actual use** of the systems for managing work product. ECM systems command significant investment, in terms of both initial and ongoing capital and resource outlays, and the adoption of ECM technology often requires the widespread embrace of new institutional use paradigms.

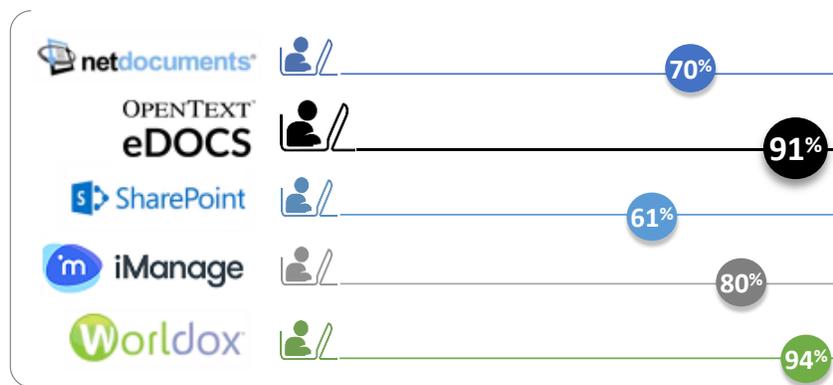
Perhaps user adoption, then, is observed with “rose-colored lenses” of sort. Despite continuing growth in ECM investment, the adoption of these systems by attorneys, paralegals and other users still lags. As reported by users, the average adoption rate of legal organizations is just over 70 percent, and nearly 16 percent of ECM-enabled legal organizations reported **universal adoption** (100%) (**Fig. 3** below). System-specific adoption rates also paint an interesting and compelling picture of market dynamics (**Fig. 4**).

**THE MISCONCEPTION THAT “ADOPTION” RELATES TO THE NUMBER OF USERS WITH ACCESS TO THE SYSTEM IS PERVASIVE, AND IGNORES THE AMOUNT OF INSTITUTIONAL CONTENT ACTUALLY CAPTURED BY THE DMS.**

**Fig. 3 | ECM SYSTEM USER ADOPTION**



**Fig. 4 | ECM USER ADOPTION RATES BY SYSTEM**



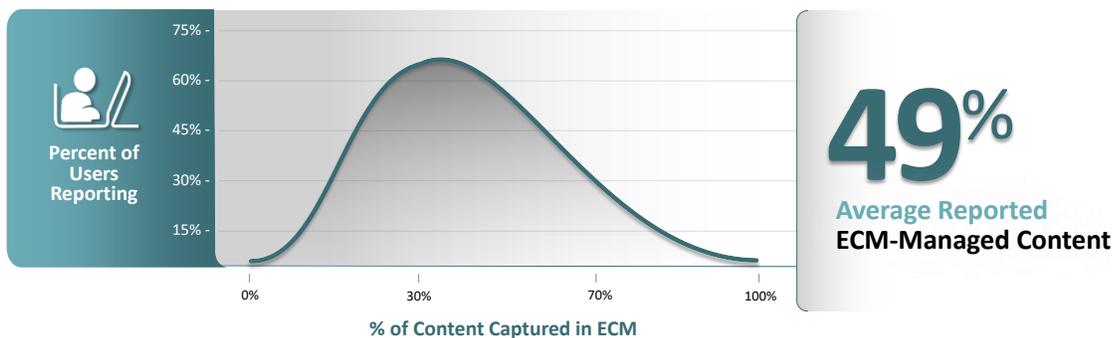
## DISSONANCE IN ADOPTION

The notion of Adoption in ECM is truly a multi-dimensional matter, and it is fundamentally impossible to surmount the modern challenges of user adoption in the absence of incorporating the concept of 'content capture' in the discourse. While "adoption" in ECM is generally and widely defined as the percentage of users *with access to the system* (as exemplified in **Fig. 3**), the percentage of *content captured in the system* (**Fig. 5**) is also a profoundly important – and often overlooked – measure of the system's use and correlates strongly to the measure of ECM's return on investment.

When we pivot the focus of adoption metrics more precisely to *actual content captured by and archived in enterprise document management systems*, empirical data demonstrates a precipitous drop in confidence (**Fig. 5**). The high reported "adoption" figures as demonstrated in **Fig. 3** illustrate precisely the disconnect among users: the misconception that "adoption" relates to number of users with *access* to the system, regardless of how much they use it, is pervasive, and ignores – importantly – the amount of institutional content **actually captured** by the DMS.

Empirical research suggests that less than half of global active enterprise content is actually captured by the document management repository in place. Though rates vary widely by organization, nearly two-thirds of organizations report actual content capture by the DM at less than 50 percent of the organization's total content. The single largest group reported total capture at 10 percent or less – or put another way, more than 90 percent of organizational content is **not** in the document management repository in place.

Fig 5 | PERCENT OF TOTAL CONTENT CAPTURED IN ECM



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## REDEFINING USER EXPERIENCE

Perhaps more significantly than ever before, user adoption is broadly affected by issues of accessibility and experience. In this context, experience is distinguished by a myriad of competencies that encompass user interface, control, ease of use, location and consistency of access across devices and platforms. The single most important impediment to impactful technology transformation in legal has been our paradigm that we do work in one system, and must then go to another to record that same work – it's simply not a natural human process, and breaks down rapidly.

Experience today, however, is defined and strongly influenced by the consumerization of IT. Users' experiences with technology as consumers clearly, demonstrably and materially impact their expectations regarding their technology experiences at work. In fact, many legal technology selections today are capitalizing on the consumerization of IT and proliferation of mobile devices by seeking applications aimed specifically at improving employee productivity and client satisfaction.

Understanding ECM user needs must include a close study of the ways in which users work and the core values they prioritize. For example, the "appification" of productivity applications on smartphones and tablets has fundamentally changed the way knowledge workers create and interact with information, both in the current generation of workers as well as the generation of Millennials rapidly entering the workplace. It stands to reason that the same expectations will drive how desktop applications should function. The way we pivot our ECM technologies to integrate with and overlay content creation systems will serve as the key catalysts for productive, effective and *collaborative* work processes.

**ACCESSIBILITY  
TODAY IS DEFINED  
AND STRONGLY  
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