

IBM ECM Program and Competency Center Approach

Executing a unified ECM vision and practice for the enterprise



Increase agility in 4 key areas:



**Improve
customer
service**



**Raise
productivity**



**Enhance
compliance
& risk**



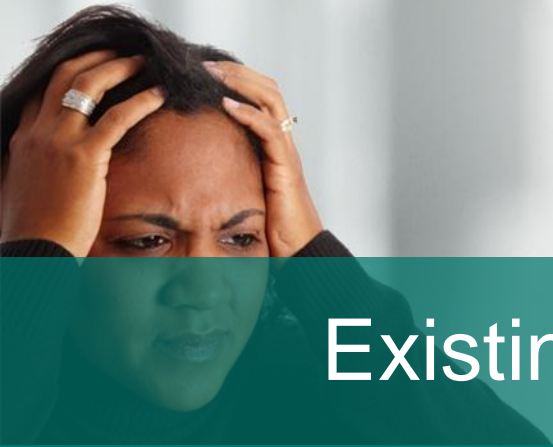
**Improve
time & cost**



Challenges faced by the Business

- Slow solution delivery causing lines of business to live with inefficient systems
 - Existing solutions that are manual, outdated, underperforming, or otherwise do not meet departmental needs
 - Lack of visibility to existing solutions that can be taken advantage of by the business
- Consequently**
- Business often bypass IT and purchase separate, proprietary systems
 - Interdepartmental collaboration is stifled when departments work on independent software platforms
 - Lack of IT support results in an inefficient and ineffective work environment

**Disconnect between LOB and IT
reduces the efficiency of the organization**



Existing problems for IT department

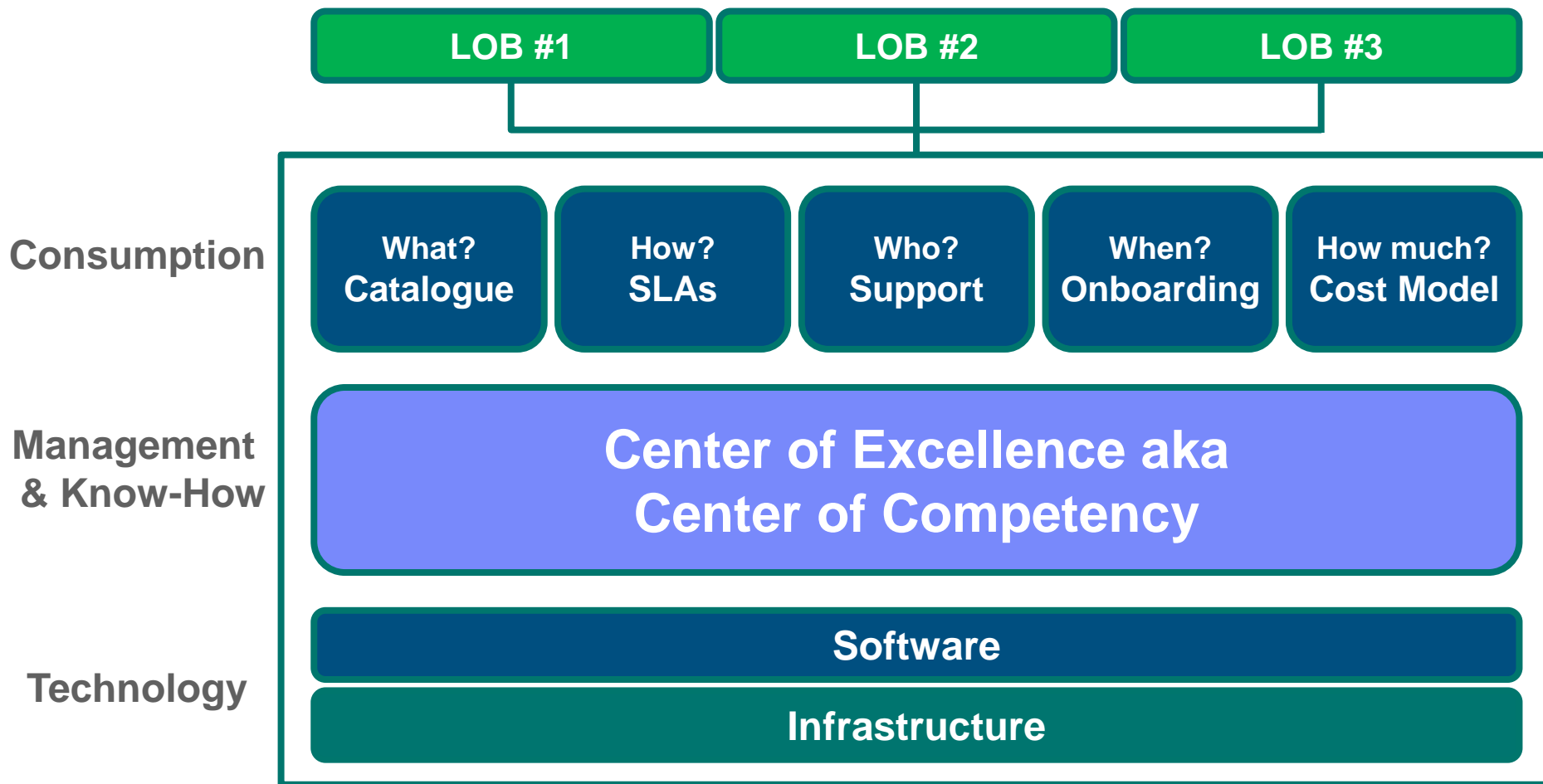
- Difficulty maintaining control and management of resulting corporate data
- LOB software does not adhere to corporate governance and compliance policies
- Lack of resources to support large variety of software platforms

Consequently

- IT department struggles to meet the needs of the lines of business
- IT begins to lose control of technology across the enterprise
- IT shoulders the burden of supporting and integrating many disparate systems

**Disconnect between LOB and IT
reduces the efficiency of the organization**

Agility from a Content Center of Excellence



1. Strong internal executive sponsorship for ECM initiatives

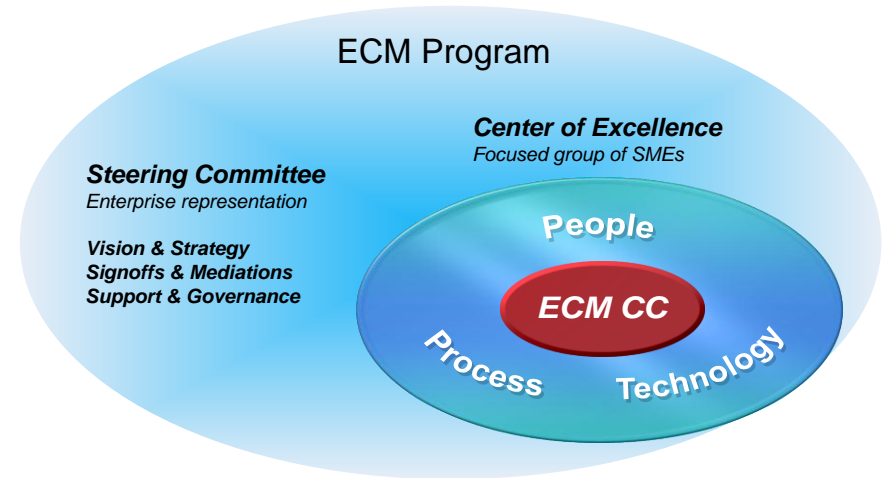
IM CC

ECM Steering Committee

- Provide high-level sign-off for company-wide ECM challenges
- Sponsor a unified global vision and ECM strategy for implementation
- Support and guide the transformation process

ECM Competency Center

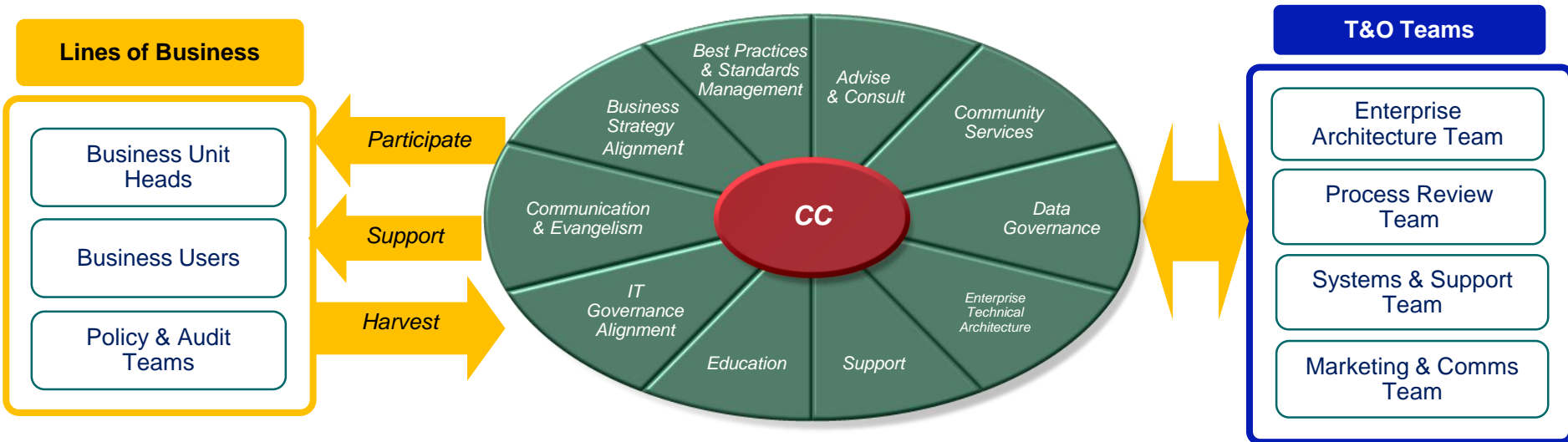
- **What?** A formal structure of people within an organization focused on the enablement of ECM technology across the enterprise
- **Why?** To leverage best practices and domain knowledge for sharing, transferring, and broadening skills
- **How?** Employing a consistent set of standards and processes coordinated with a governance structure to make binding decisions and consensus recommendations



2. A Close Working Relationship: IT and Business

Establish a Shared Services Competency Center

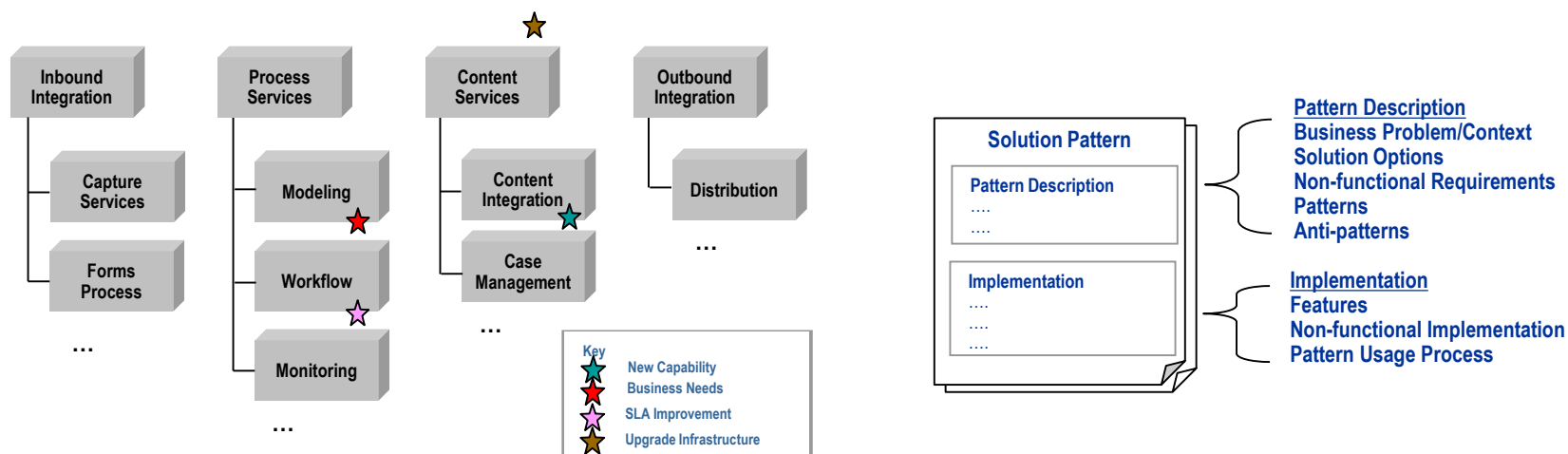
- A focused team of SMEs executing on the enterprise strategy
- Collaborate with the Business on the journey
- Consolidate lessons learned and best practices
- Create reusable services and capabilities
- Share the insights with the rest of the organization for enterprise wide benefit



3. Shared services implementation to promote standardization and reuse

Build a foundational framework

- Create a Capability Roadmap (generic and specific requirements)
- Map a Services Catalogue (what is currently available and what is on the roadmap)
- Establish Solution and Architectural Patterns



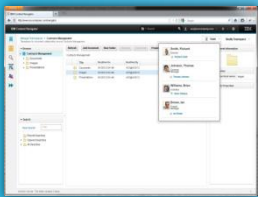
IBM ECM portfolio at a glance

User Experience

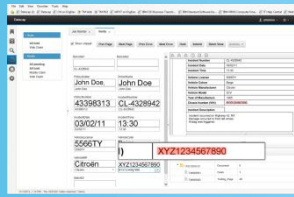
Content Navigator

Systems of engagement

Content Navigator



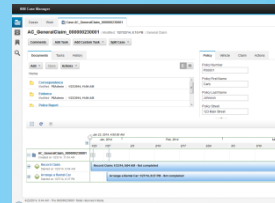
Advanced Document Capture



Mobile Apps



Case Manager



Content Analytics



Data about your data



Trusted platform

Content Platform Engine

Transformative data



Databases, app servers and directories



Content Repositories



Storage: digital and physical



Standardize on IBM Case Manager



Content Development Business Requirements

Master rapid deployment by leveraging a common infrastructure and licensing model

Integrate and liquidate legacy systems, eliminating multipoint data silos

IBM Case Manager



Shared Services

Capitalize on data assets across the enterprise as shared services yield benefits for all lines of business

Reuse learned skills by deploying shared services on a standardized platform

Filter Business Content to place it in Context

The best search is no search at all

Social View

Video

Jobs View

Case Details

Maps

Images

History

Related cases

Customer Communications

Analytics

IBM Case Manager

Work Cases Case INCID_Incident_000000360007

My Cases (3)

5 Cases due today

SOCIAL

Comments

Overview

Contact Name: Mo Incident Date: 30/09/2014 00:00

Contact email: mo@mymail.com Incident Category: Social Media

Phone Number: 949-555-1212 Source: Twitter

Location: London, UK Case Stage: Investigating

Description: Negative customer sentiment found by Watson Content Analytics Social Media Crawler

Related Cases

Product	Description	Purchased	Warranty State
LG-FR993	Refrigerator	13/05/2014	Warranty
LG-VC904	Vacuum	15/12/1012	Extended Warranty
LG-DW12			

Customer Communications

LG @LG_APPL 3h
LG Can't believe my one year old #LG-DW12 dishwasher started leaking and flooding my house 2 days after the warranty expired! Makes me wonder if this company designs their products that way.

History

Today

- Close Case Task completed 14:24 PSAAdmin
- Product warranty had expired. Responded to customer that service costs would not be covered. Comment added to case 14:33 PSAAdmin

Earlier this week

- Required Documents Task started

Analytics

Results sort of or Sort by (Relevance)

00000100006
16 Jan 1970 10:15:17
Review Feedback - I need to pay a bill using my money and they hold onto my money for more than 2 weeks. Why is it that possible reason can they have to withhold money from me for longer than 2 business days? What they charged me for "Insufficient funds" and hold my funds from which also affects my

00000100005
16 Jan 1970 10:15:16
Review Feedback - I need to pay a bill using my money and they hold onto my money for more than 2 weeks. Why is it that possible reason can they have to withhold money from me for longer than 2 business days? What they charged me for "Insufficient funds" and hold my funds from which also affects my

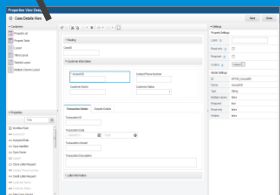
00000100008

30/09/2014 12:46 - The 000000360007 folder returned 1 items.

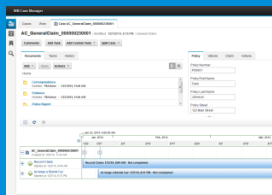
A one-click deployment from Case Builder manage deployment of solutions through development, user acceptance, and production

The Case web application built on top of the IBM Content Navigator User Experience framework brings consistency and reduces training

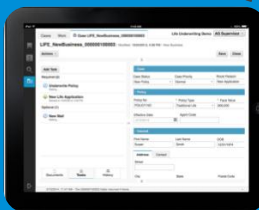
Case Builder



Case Client



Mobile Client



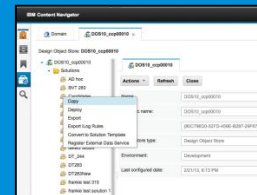
Real Time Dashboards



Content Analytics



Web Based Admin Tools



Shared Services

Rapid App Dev

Solution Templates

Case History

Case Task Model

Case Folder

Embedded Rules

Customizable API's

The role-based Case Client can be easily customized using drag and drop page and data layout tools, custom reusable page widgets

All case content is persisted in the ECM content repository and available across the organization

The case folder drives and controls many individual tasks that run in the context of a case

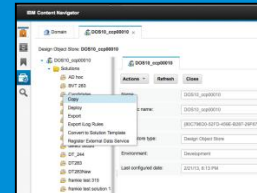
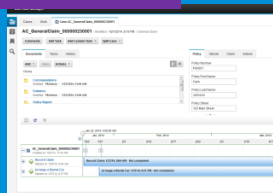
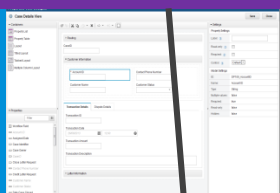
Content

Mobile Client

Real Time Dashboards

Content Analytics

Web Based Admin Tools



Shared Services

Rapid App Dev

Solution Templates

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Customizable API's

IBM Content Navigator

Workflow Design

Case Analyzer

Case Monitor

Cognos RTM

eForms

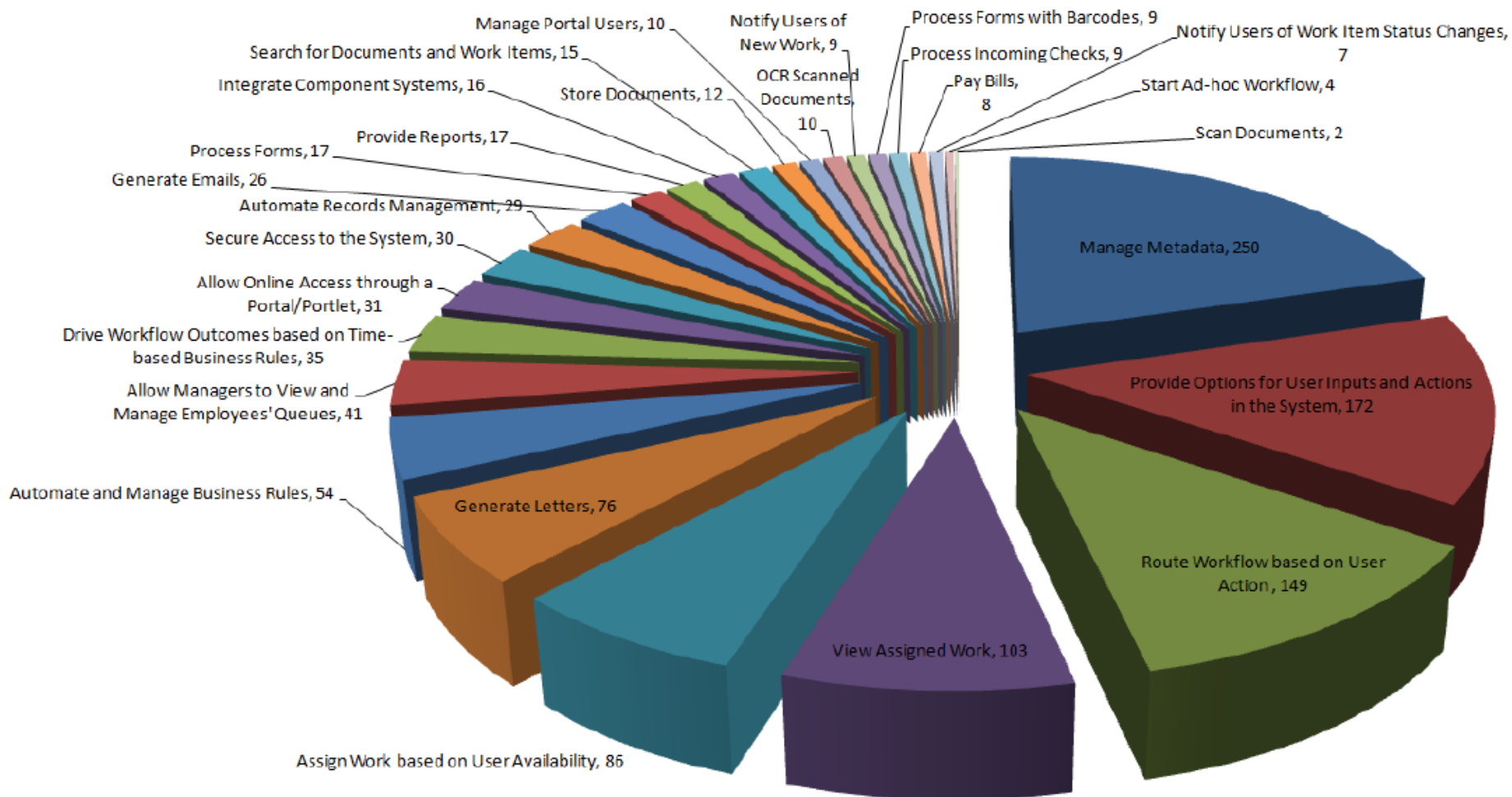
Workflow APIs

Content Platform Engine (Content Foundation + Case Foundation)

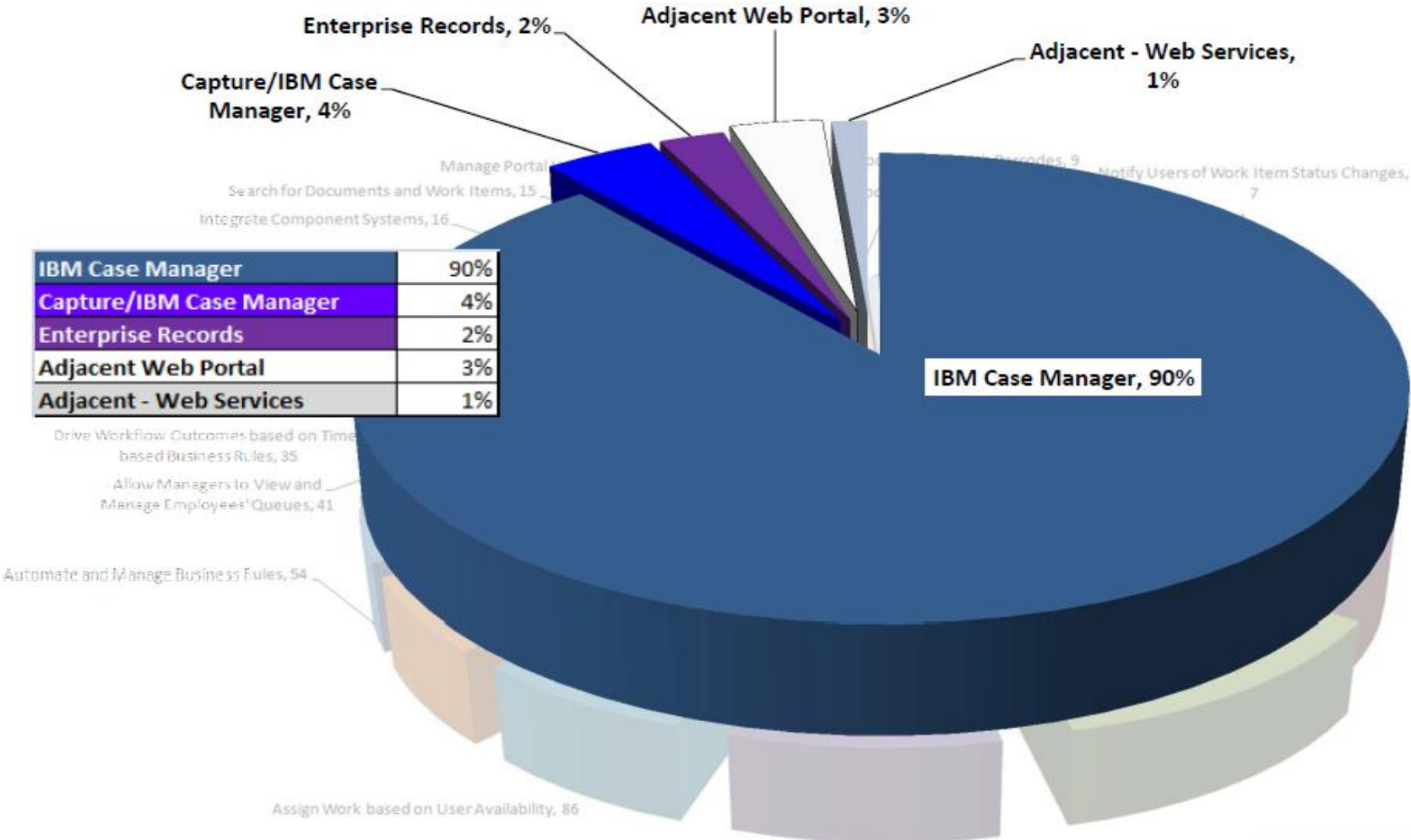
Trusted Platform

One client's solution requirements...

- Over 1,600 Requirements, 27 Categories



90% of requirements met with Out of the Box Case capabilities



United Overseas Bank



“ IBM enterprise content management solutions have changed how UOB captures and manages customer information. ”

– Agnes Tay, Head of Scanning Operations, United Overseas Bank

Reduced time and effort

to process international wire transfers, increasing efficiency

Faster processing

30% reduction in time and effort required for processing credit card applications

Better customer service

Real time, **360 degree view** of every customer request helps UOB maintain its competitive edge

Engagement through shared services for content

Goal 1 – Enable Operational Excellence

- **Enable cost savings by organizing work for specific skill sets within operating centers**



Goal 2 – Achieve Process Efficiency

- **Route work across operating centers and teams**
- **Automate business rules and capabilities in a paperless environment**

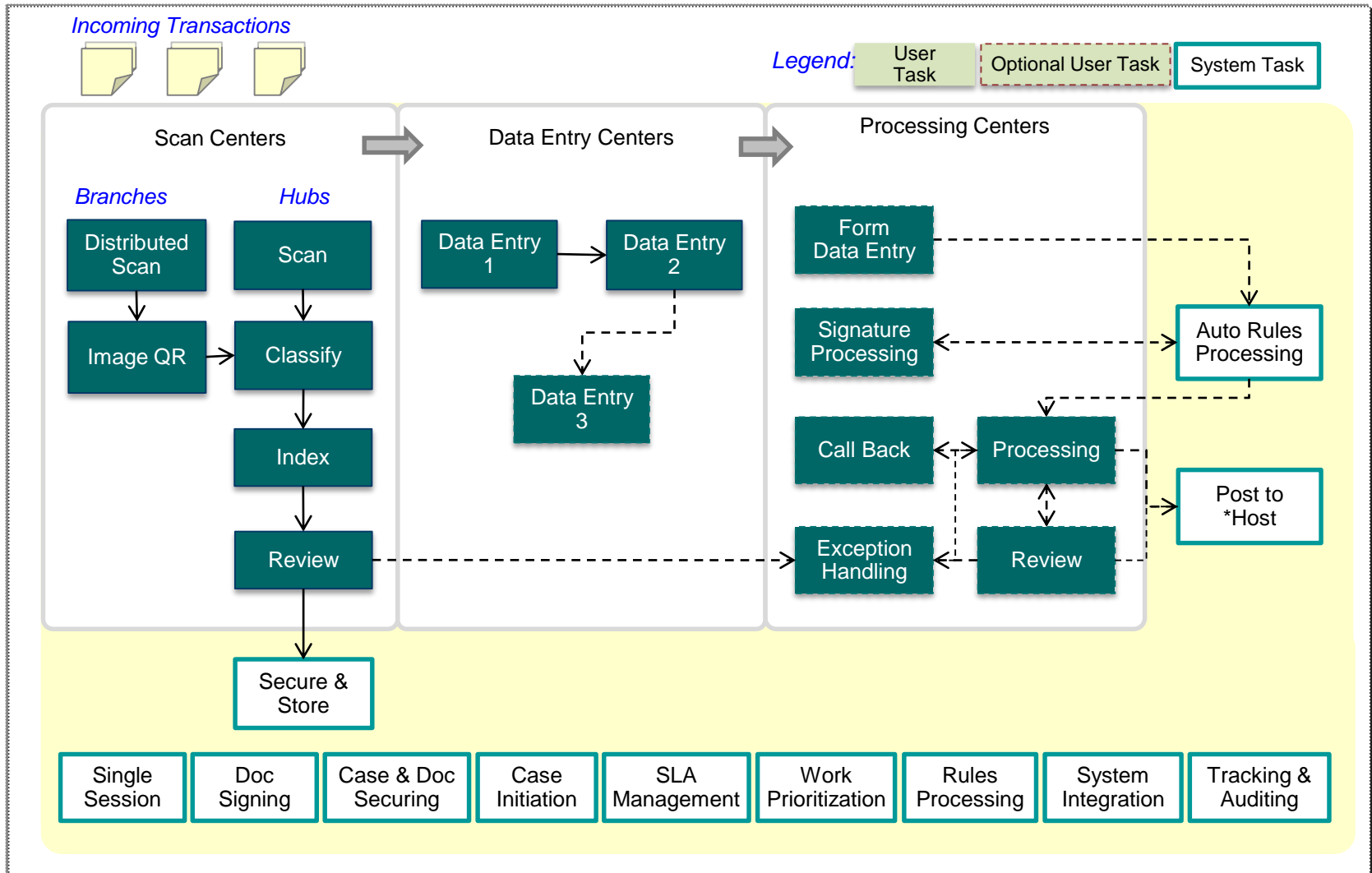


Goal 3 – Establish Platform Reusability

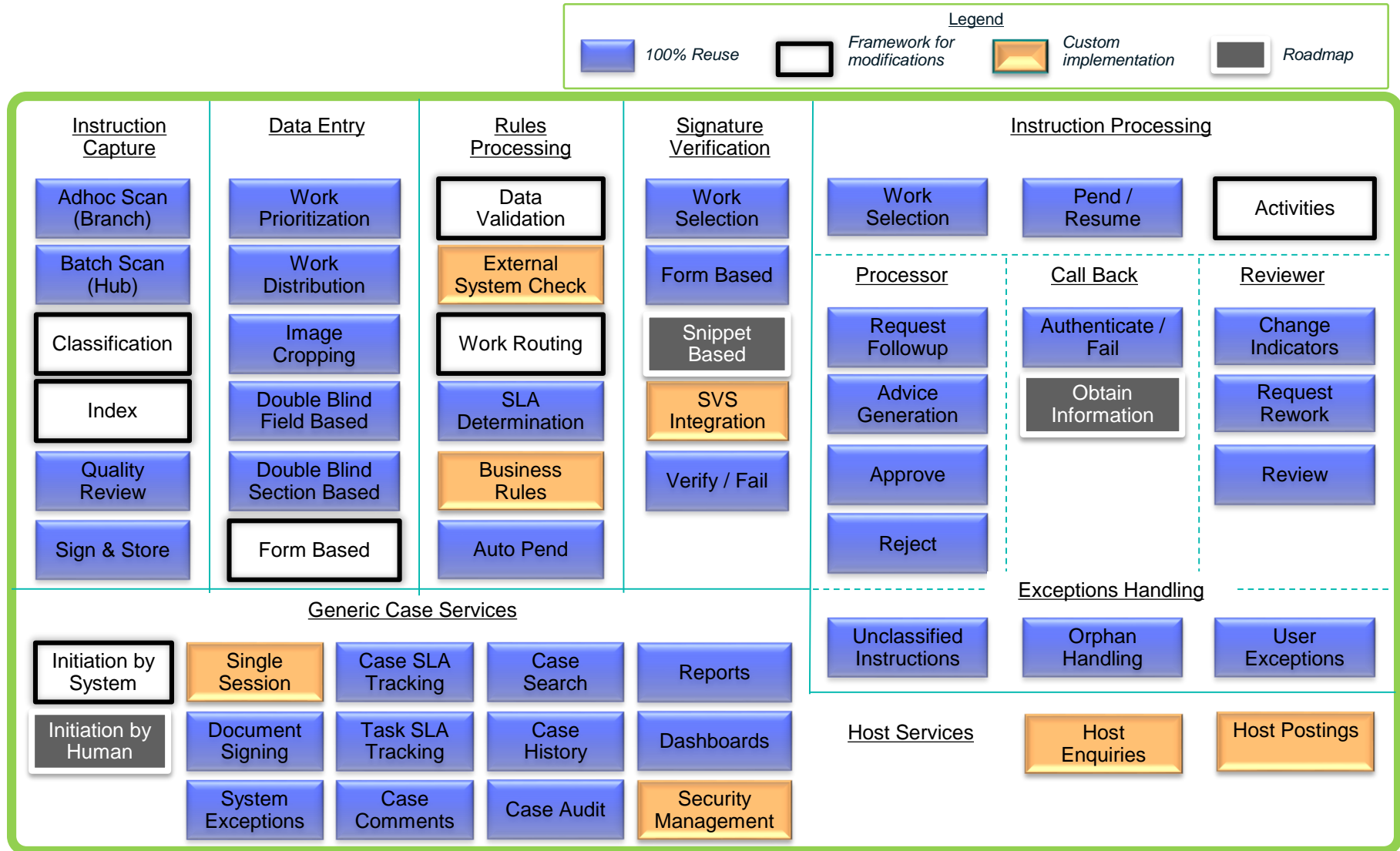
- **Create a foundation for development and operational improvements**
- **Realize the benefits of content, capture and case management technologies for competitiveness**



Create a standardized model



Establish a capabilities roadmap





Technology implementation efficiency

Reduced Timeline

- Standard operational model and solution patterns narrow requirements, misunderstandings, and clarification timeline.
- Reuse of services components drive faster implementation

Reduced Risk

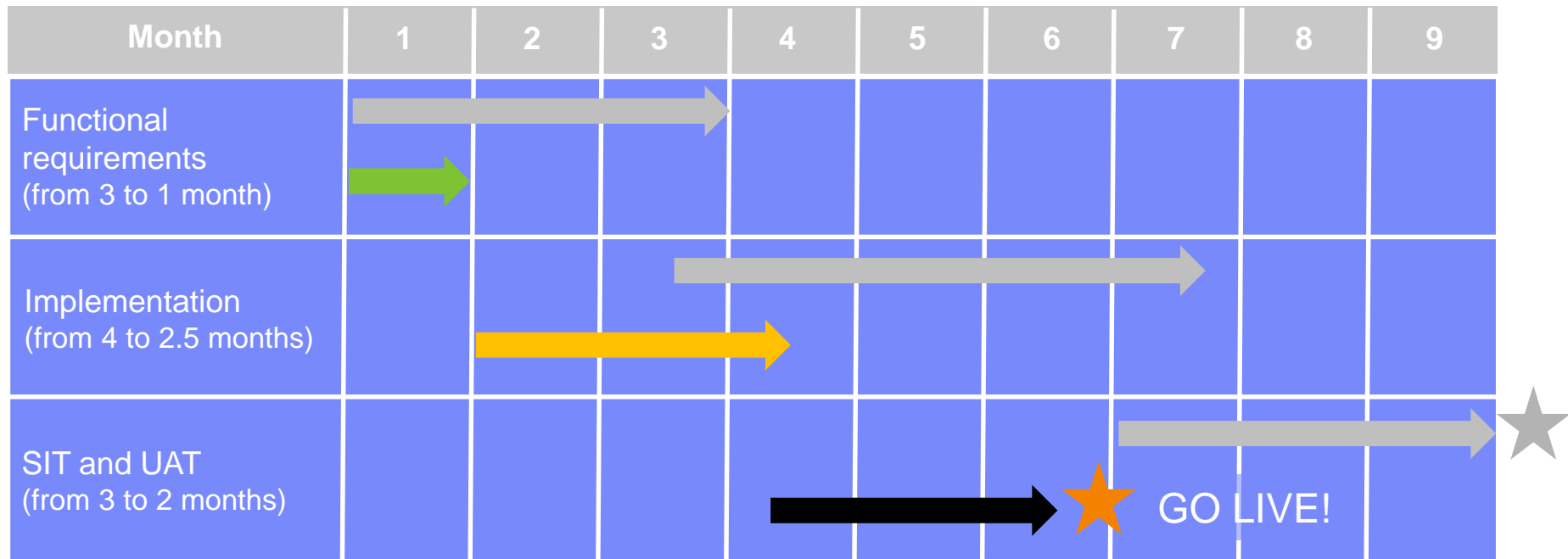
- Proven process and technology components are less risky to implement
- Standardization eliminates one-offs or specialized knowledge
- Fewer variations and changes require less testing

Reduced Cost

- Shared capabilities means services are developed once and used many times
- Training cost is lowered as process steps are standardized
- Common capabilities can be deployed to multiple business units at one time



Technology implementation efficiency



Business value gained after implementation

Enterprise Value

- Real time, **360 degree** view of every customer request
- **Secured** and compliant management of customer data at every access point
- End to end audit history for **100% accountability**
- **Automated** business rules evaluation, work management and prioritization based on request type, work accessed, and Service Level Agreement tracking
- Standard operating model and a common technology framework for **100% reuse** and extendibility to house hundreds of case types

Outward Remittance case

- **25% reduction** in time and effort required for processing international wire transfers
- Implemented on the common EWF framework with **30% fewer steps** required to complete the wire transfer process, increasing efficiency

Credit Card Application case

- **33% reduction** in time and effort required for processing credit card applications
- **42 reams of paper** saved per month
- Implemented on the common EWF framework, in a reusable solution extendible for all types of card application processing

**Learn how a Shared Services approach can reinforce business value!
Join the IBM ECM Shared Services Inner Circle!**

Next Steps:

Stay connected and participate in the ECM Shared Services Inner Circle by joining the LinkedIn Secured access group:

ECM Shared Services
<http://linkd.in/1B5MhGP>



Follow Discussions, add Comments. Learn about upcoming events and webinars.

IBM ECM Shared Services Inner Circle

Learn how IBM ECM Clients are exploring a roadmap of Shared Services options to promote standardization, shared intelligence and reusable assets to reinforce the value of a company's investment of IBM ECM software solutions and services.

Share insights on your own successful Shared Services deployment models such as creating an ECM Center of Excellence or Competency Center, strategic re-use of software assets and the business advantages of building an enterprise quality ECM architecture and learn from those who have already embarked on the journey.

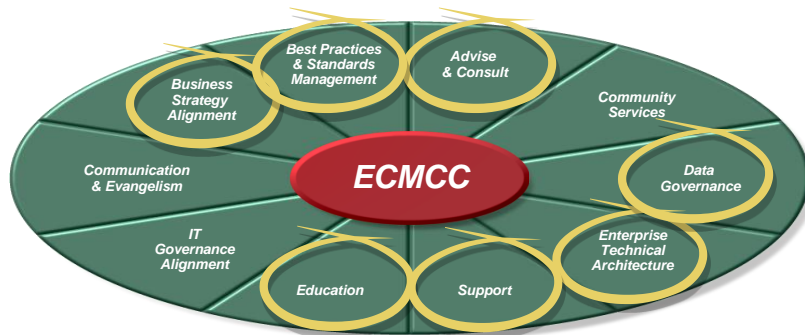
Benefits of a Shared Services Model

- Tighter, stronger alignment with enterprise strategy
- Responsiveness to business growth and changing business needs
- Accountability for quantifiable results and smooth execution
- Optimized cost of ownership, breaking down silos for faster return on investment
- Improved productivity and efficiency, minimize backlog
- Enhanced compliance, audit, governance
- Mitigate risks with standard and consistent implementation of ECM capabilities
- Faster and more effective deployment
- Reduced cost of operation
- Top-down strategic use of ECM as a tool for change

ECM CC value proposition for the business

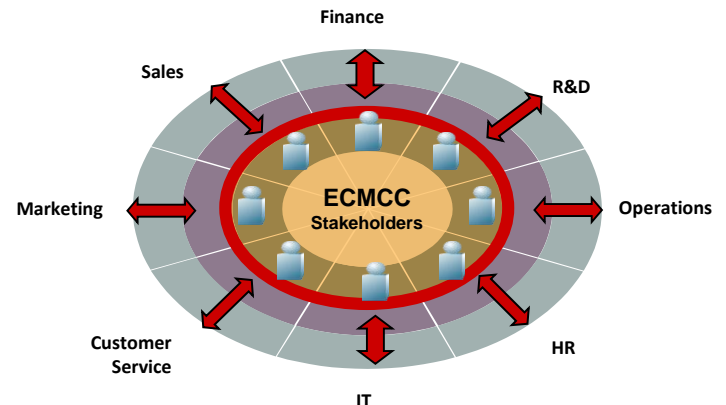
ECM CC value

- Drives ECM capabilities roadmap, building consensus on priorities
- Drives information quality, data ownership and common business glossary
- Enables self-service, shared standards, improved analytics
- Facilitate KPI/metric definitions



Business benefits

- Better alignment with strategy
- Improved confidence in data
- Responsiveness to changing business environment, improved processes
- Clearer accountability for business results, align execution



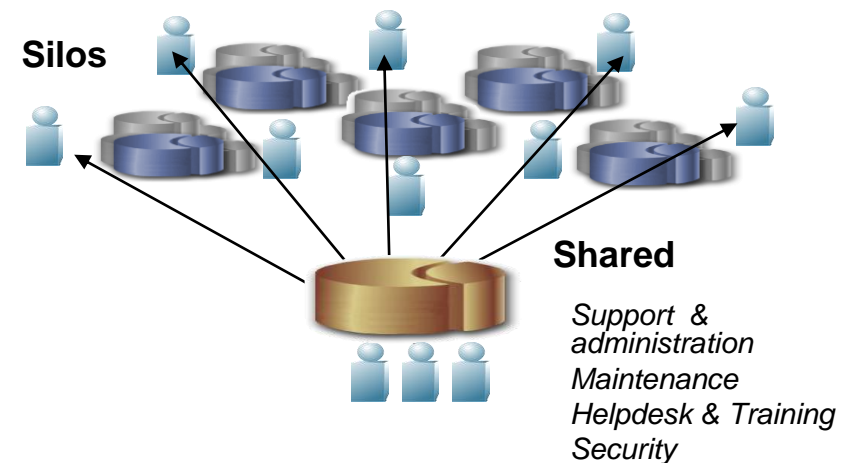
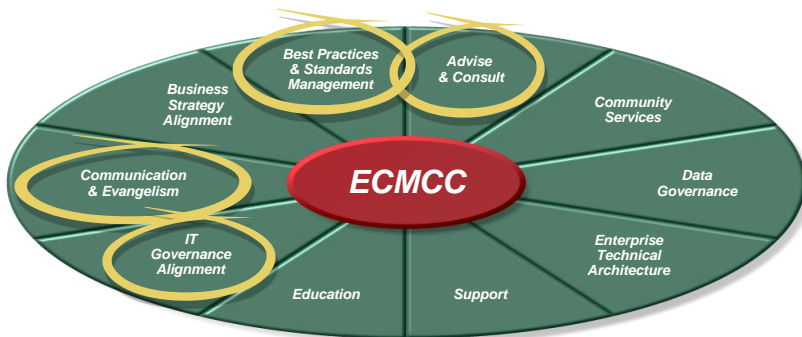
ECM CC value proposition for IT

ECM CC value

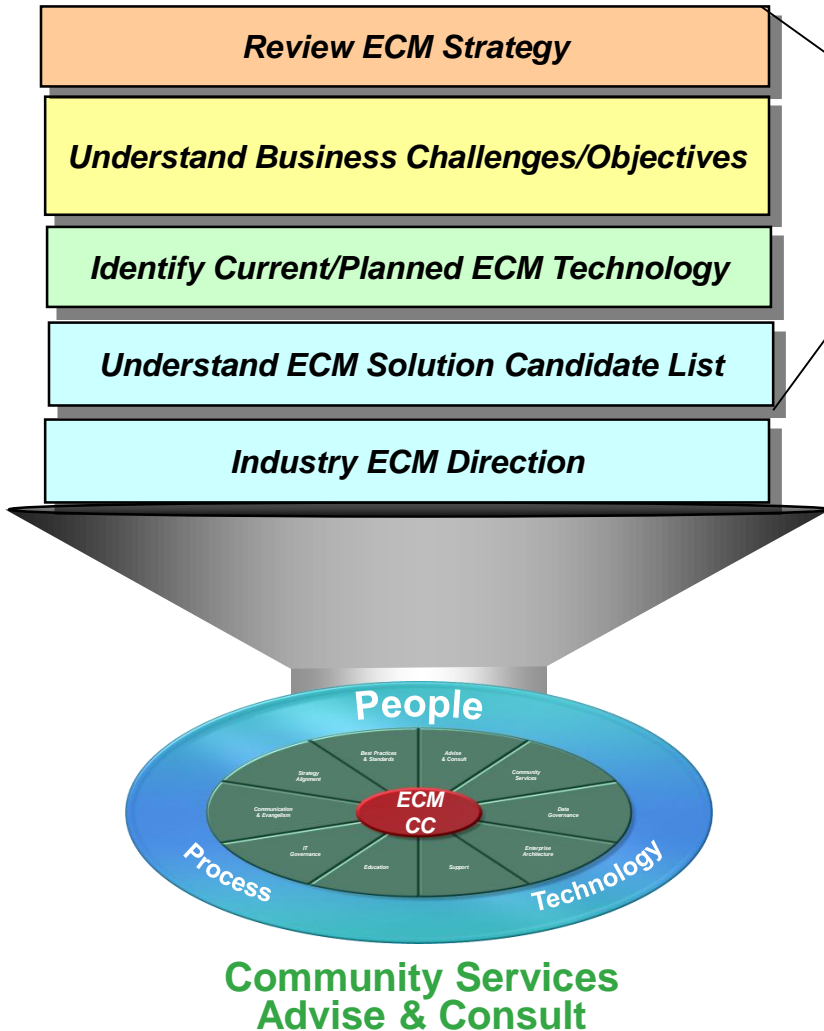
- Drives shared, standardized ECM architecture & software
- Drives user adoption, enables self-service
- Ensures adherence to IT processes, policies, standards
- Communication & recognition of success

IT benefits

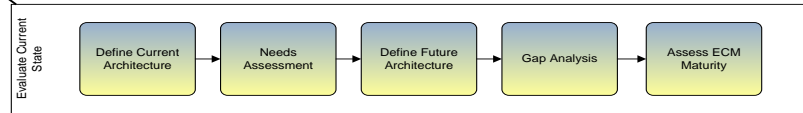
- Optimized cost of ownership, breaking down silos
- Improved productivity, responsiveness, backlog
- Enhanced compliance, audit, governance
- Standardization mitigates risks



ECM CC task 1: Identify service offerings



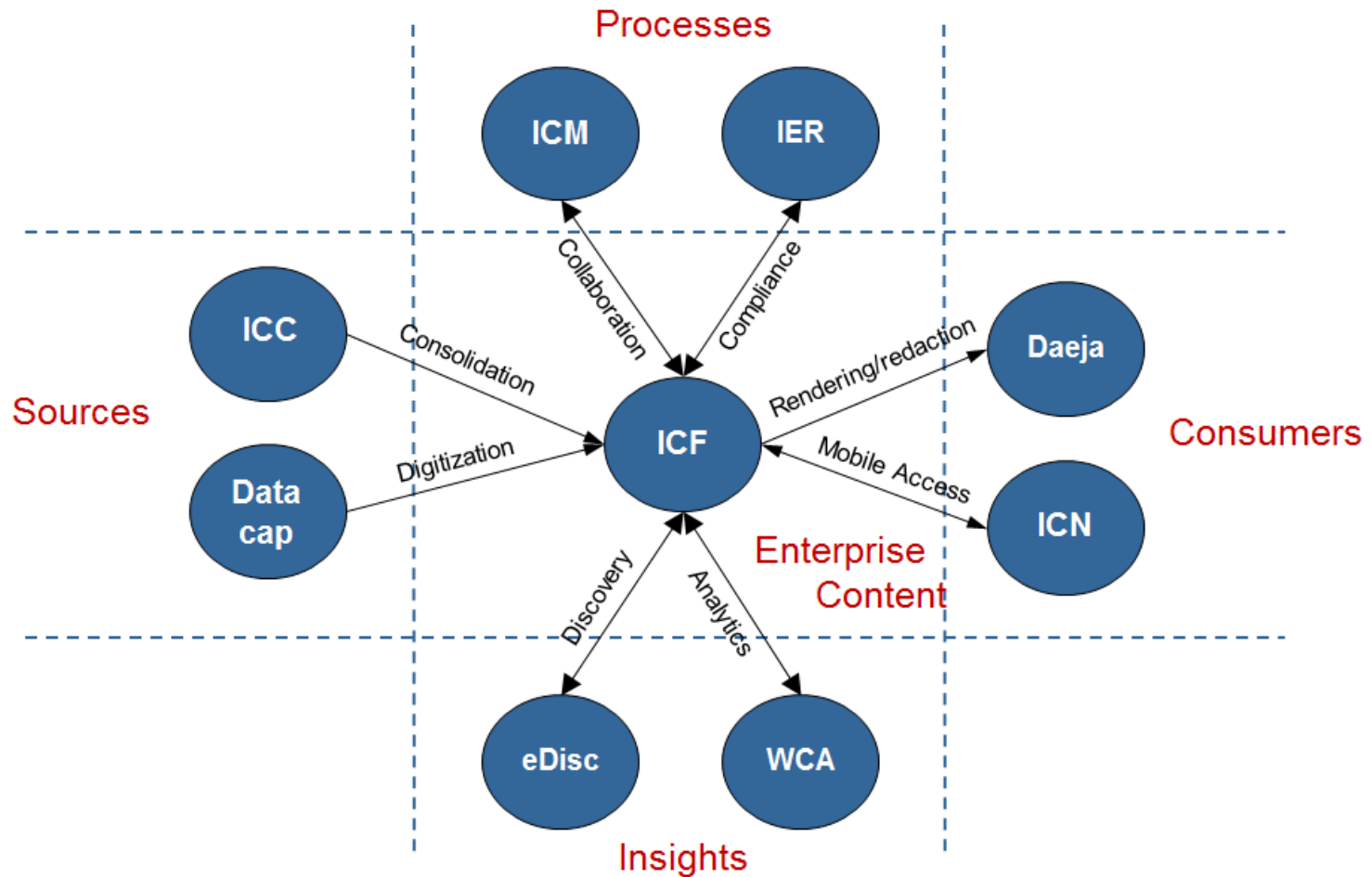
Evaluate Current State (ECM Program Roadmap)



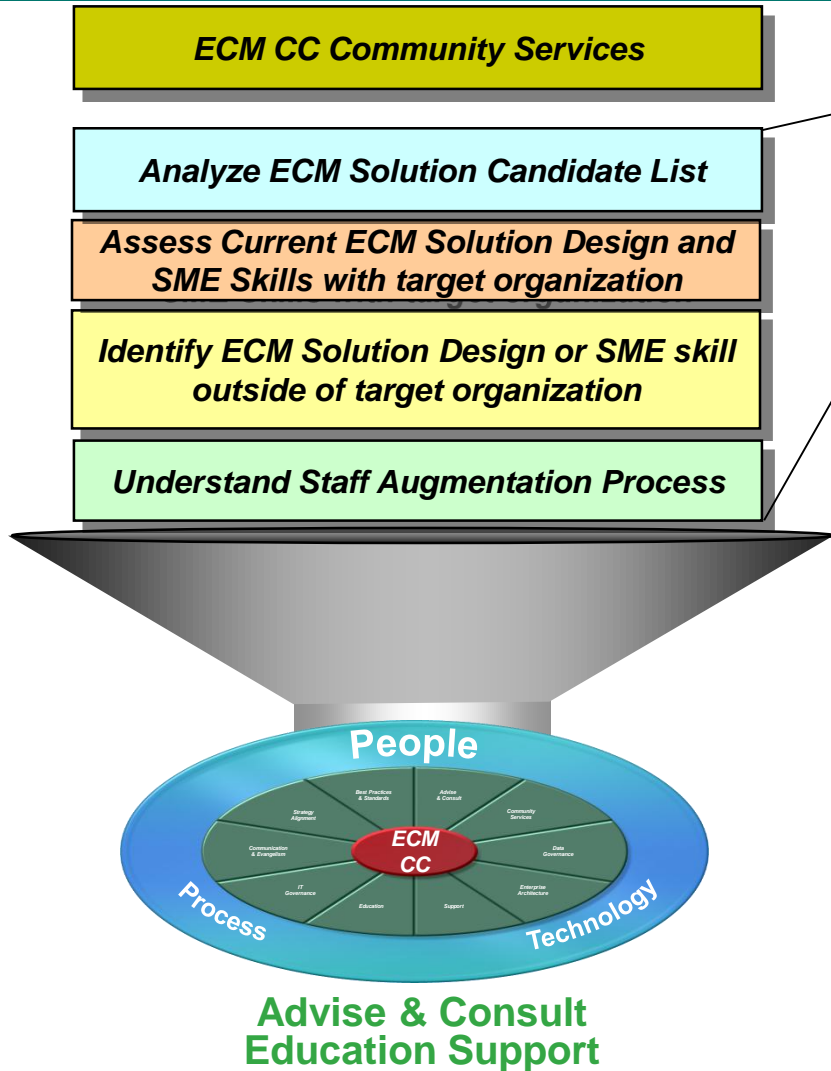
Outline current and planned ECM CC services

- ECM Technology Services
 - Solution services
 - Implementation services
 - Tiers (Packages)
 - Reusable components (patterns, code, tools)
- ECM CC Role Services
 - Consulting

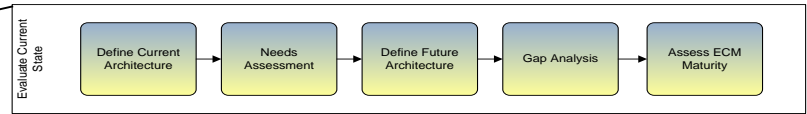
ECM Capabilities



ECM CC task 2: Develop a staffing plan



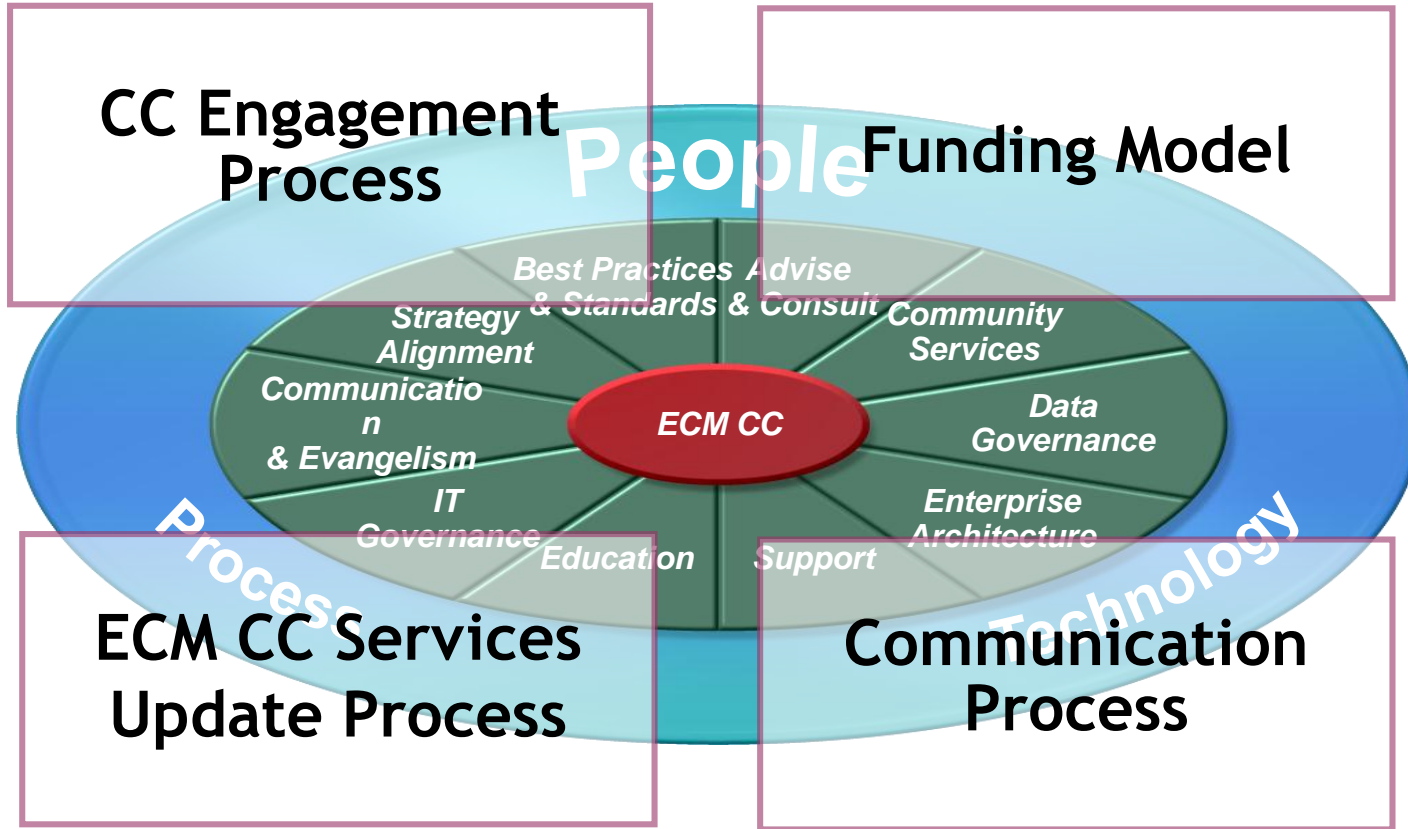
Evaluate Current State (ECM Program Roadmap)



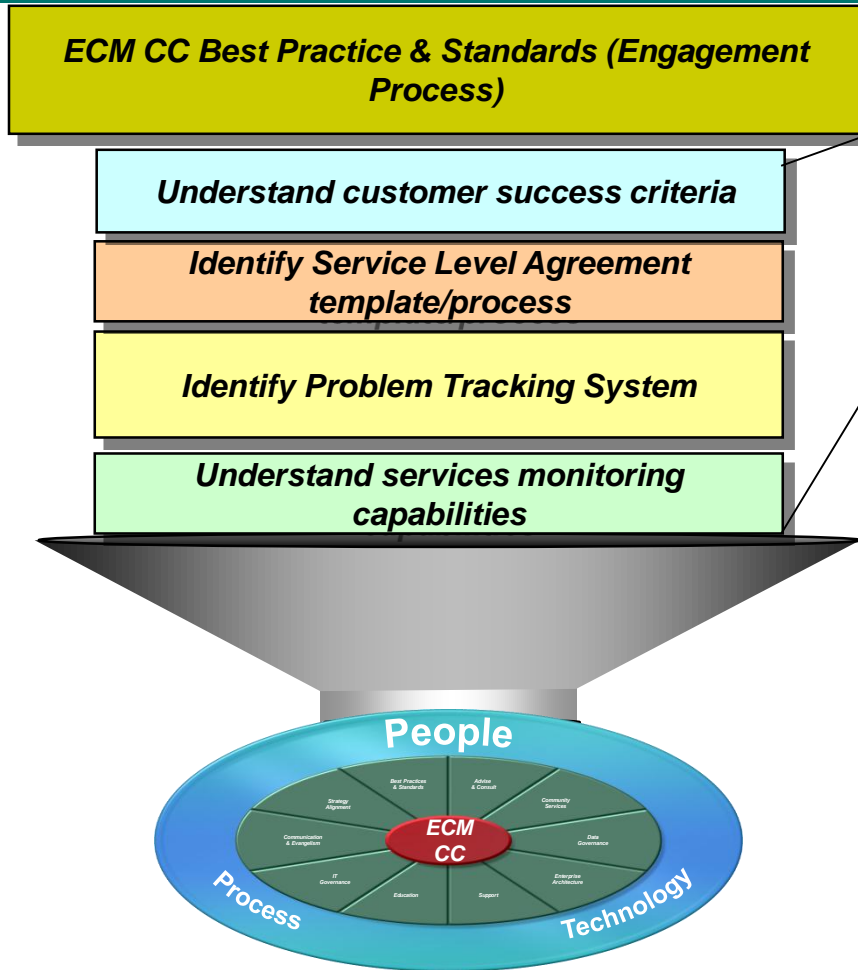
Create a staffing plan

- Establish Project Concurrency capacity objective
- Define ECM CC Organization and map out current staff to ECM CC roles based on skills
- Identifies skills gaps and a plan to fill the gaps
 - Staff Augmentation (Contract)
 - Matrix Organization
 - Training/Mentoring

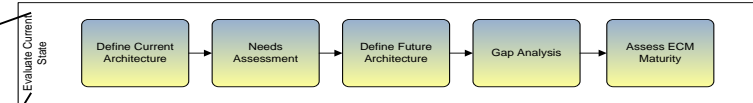
ECM CC task 3: Develop and refine key CC processes



ECM CC task 4: Key performance indicators



Evaluate Current State (ECM Program Roadmap)



Develop Starter KPIs:

- ECM projects on time and within estimates
- Achieving customers project objectives

Hard and Soft benefits achieved?

How are we doing?

- Track Services Defects
- Track Services Availability/Response
- Establish Service Level Agreements and monitor

Best Practices & Standards (Engagement Process KPIs)
 Support (Defects, SLA, Availability/Response KPIs)
 Communication & Evangelism (Customer Satisfaction KPIs)