

# IBM Advanced Case Management (ACM)

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September 2010





***The information on the new product is intended to outline our general product direction and it should not be relied on in making a purchasing decision. The information on the new product is for informational purposes only and may not be incorporated into any contract. The information on the new product is not a commitment, promise, or legal obligation to deliver any material, code or functionality. The development, release, and timing of any features or functionality described for our products remains at our sole discretion.***





***Knowledge workers in all industries must do more  
with less...***



***...yet business needs to improve service and manage  
risk while optimizing costs***



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in a complex world**

# Current Business Challenges



*Automation has handled the routine, exceptions are now the norm, many automated processes are outsourced*

*The volume and variety of information can be overwhelming...and it is arriving faster every day*

*Flexibility is essential to responding effectively to opportunities or threats*

*Regulatory or legal risks impose need to consistently adhere to critical policies and rules*

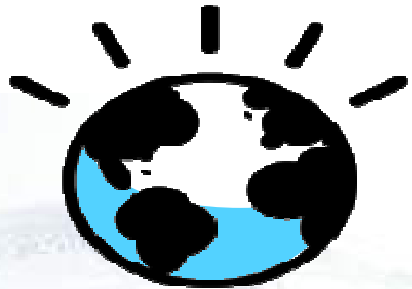
*Access to expertise is imperative to quality decision making*

*...yet busi*

*e and manage  
sts*



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*... driving a need for better  
Enterprise Content Management*



**Instrumented**  
**Interconnected**  
**Intelligent**

- Managing essential content anywhere
- Governing information over its lifetime
- Optimizing processes and case outcomes
- Deriving unexpected content insights

**in a complex world**

# What is Case Management? What Advanced Capabilities are Needed?



*Engaging people, process and information together ... in context of a case*

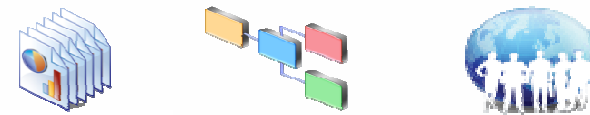
A solution pattern where...



For challenges such as...



That requires unique capabilities



## *gaps exist today for driving better case outcomes*

The judgment of people impact how the **goal** is achieved  
**Process** is often not predetermined

- Rational and vertical
- ...

- Analytics



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# Case Management: What Is New?



December 28, 2009  
**Dynamic Case Management —  
An Old Idea Catches New Fire**  
by Craig Le Clair and Connie Moore  
for Business Process & Applications Professionals

## **“Next-generation case management requires a different mindset**

*... this new case management will be a huge departure from the workflow/imaging solutions of old and will be based on predictive analytics, business rules, and social collaboration, in addition to core BPM and ECM functionality...”*

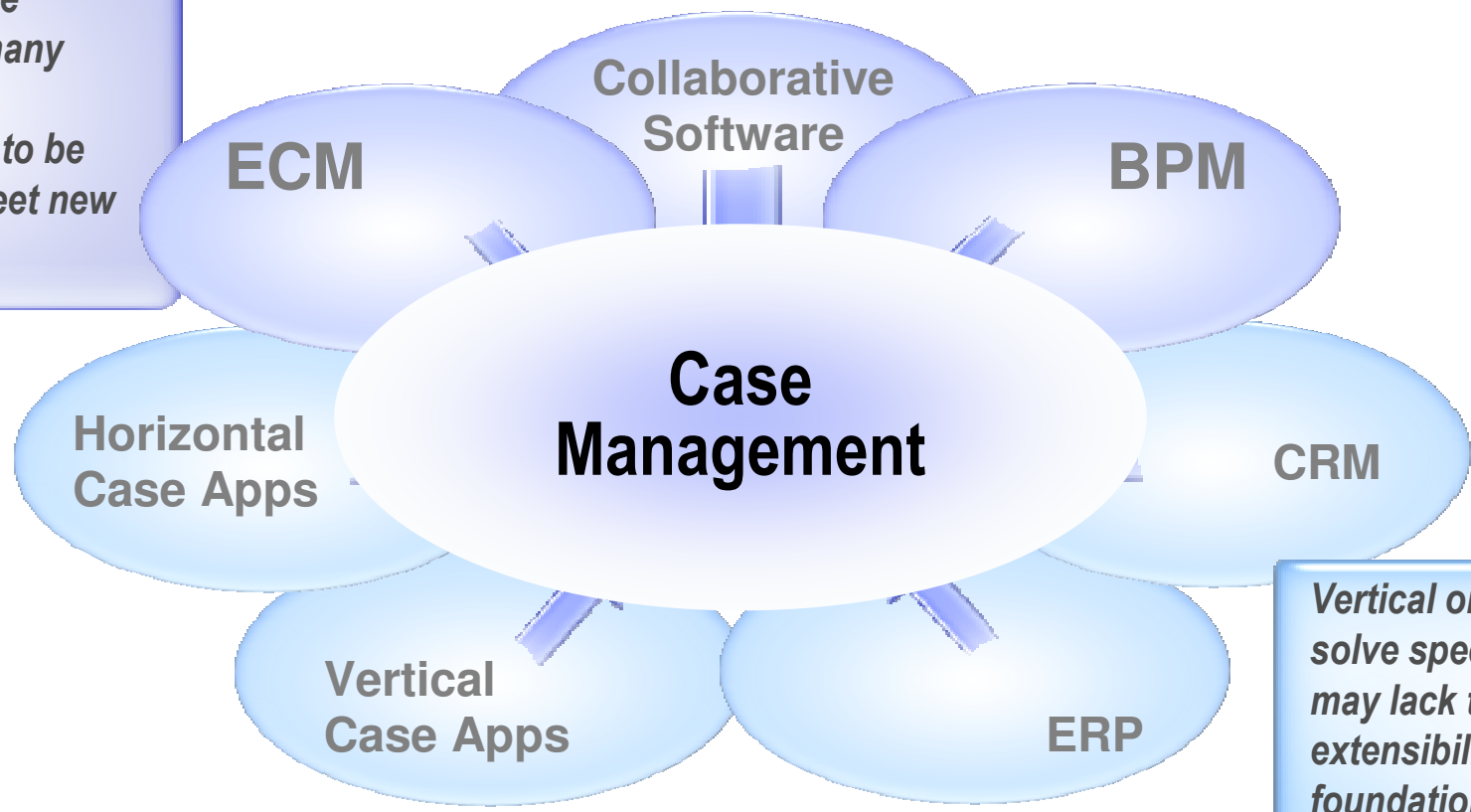


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# Next-Generation of Case Management is Emerging



*Flexible and adaptive technologies from these markets can address many case management requirements but need to be fully integrated to meet new challenges*



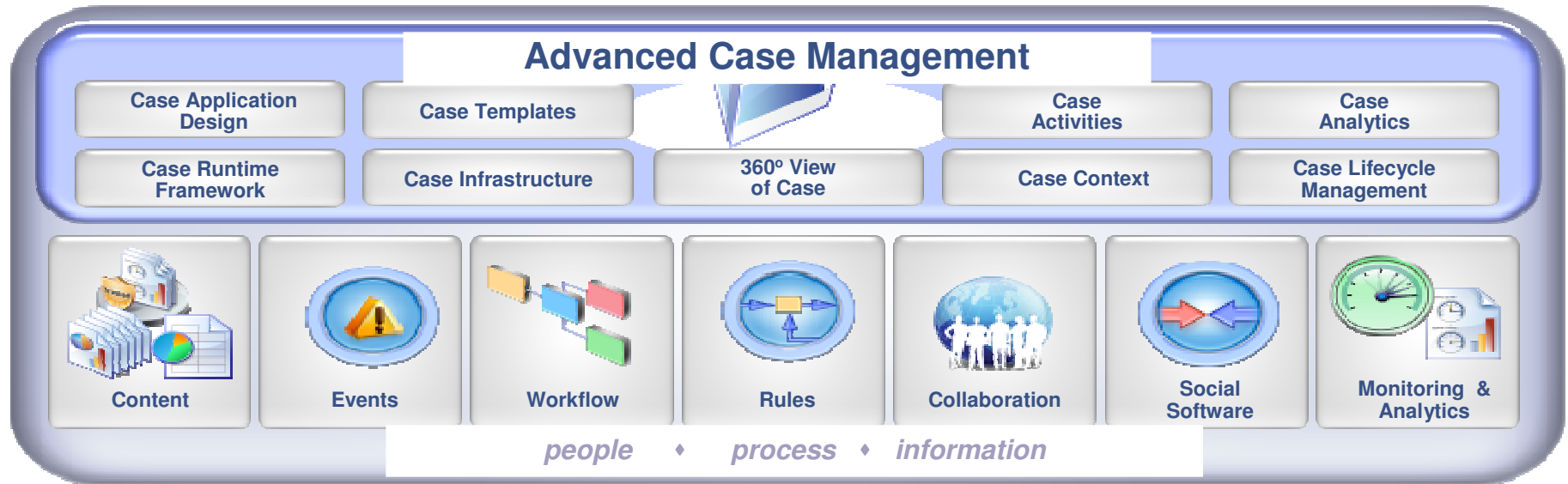
*Vertical or horizontal applications solve specific case problems but may lack the flexibility and extensibility to serve as a foundation for advanced case management*



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# Advanced Case Management Strategy



Unites information, process and people  
Delivers optimized case outcomes through analytics, rules, collaboration and social computing  
Supports work management of structured and unstructured activities  
Delivers trusted information to the case

- Manages and governs entire case lifecycle
- Provides extensive ecosystem of partners delivering case management solutions
- Shortens time-to-value with better tools, out-of-the-solutions and templating capabilities



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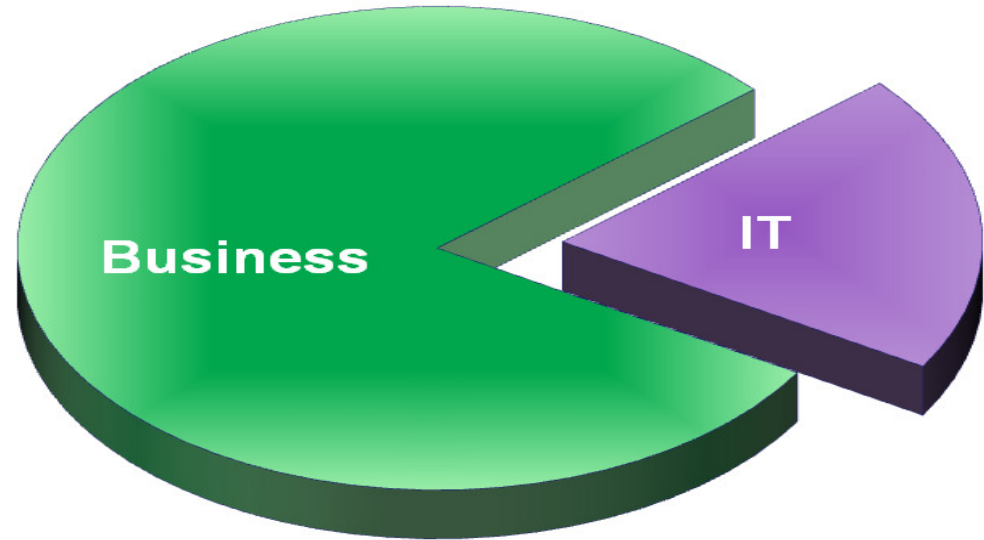
# Business & IT – Who does what?



Business Analyst



Business User



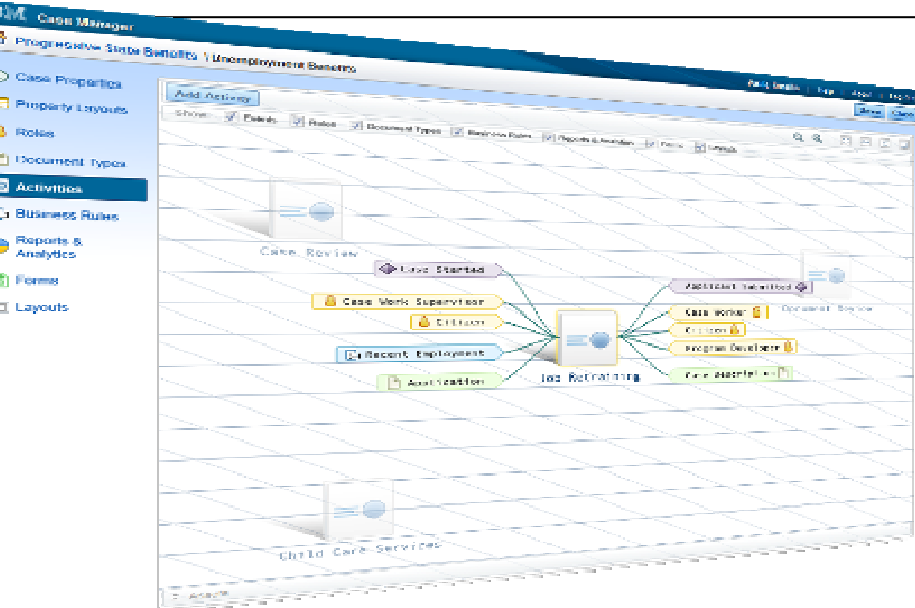
• Solution building and deployment activities are oriented towards LOB staff needs

- IT hosts and provisions systems
- IT develops services and integrations



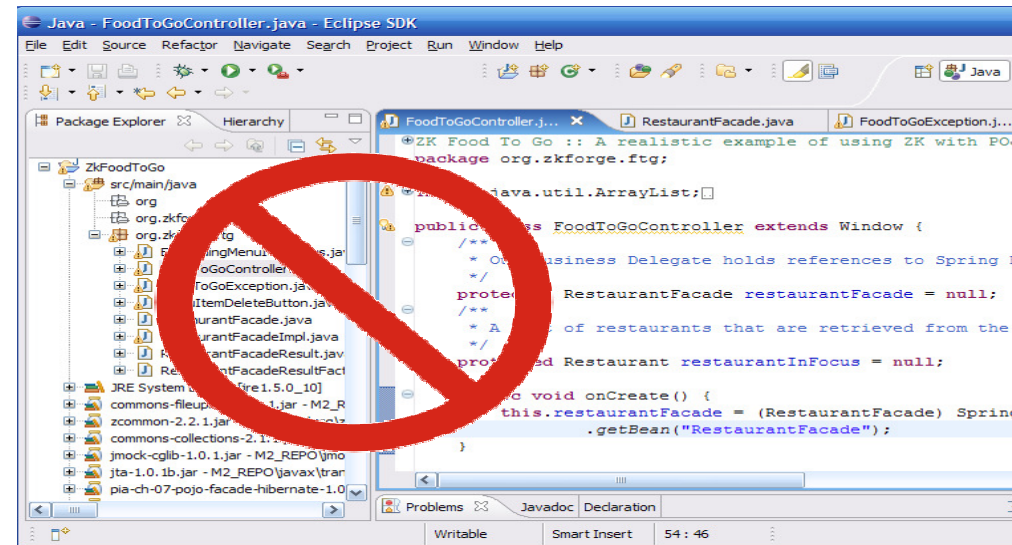
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# Business Analyst Empowerment



## Case Design for the Business

- Interview-style case definition wizard hides complexity from the analyst
- Single place to coordinate all solution design activities
- Comprehensive view across case assets
- Leverage templates for a fast start
- Significantly shortens time-to-value for case-style applications



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# Case templates



**Organization or 3<sup>rd</sup> parties can create case templates using the ACM tools**

**Case templates capture best practices for specific industries or horizontal business processes**

**A customer can start from a case template and configure to meet their specific organizational requirements**

**Configured case templates can be used to create new case management templates**

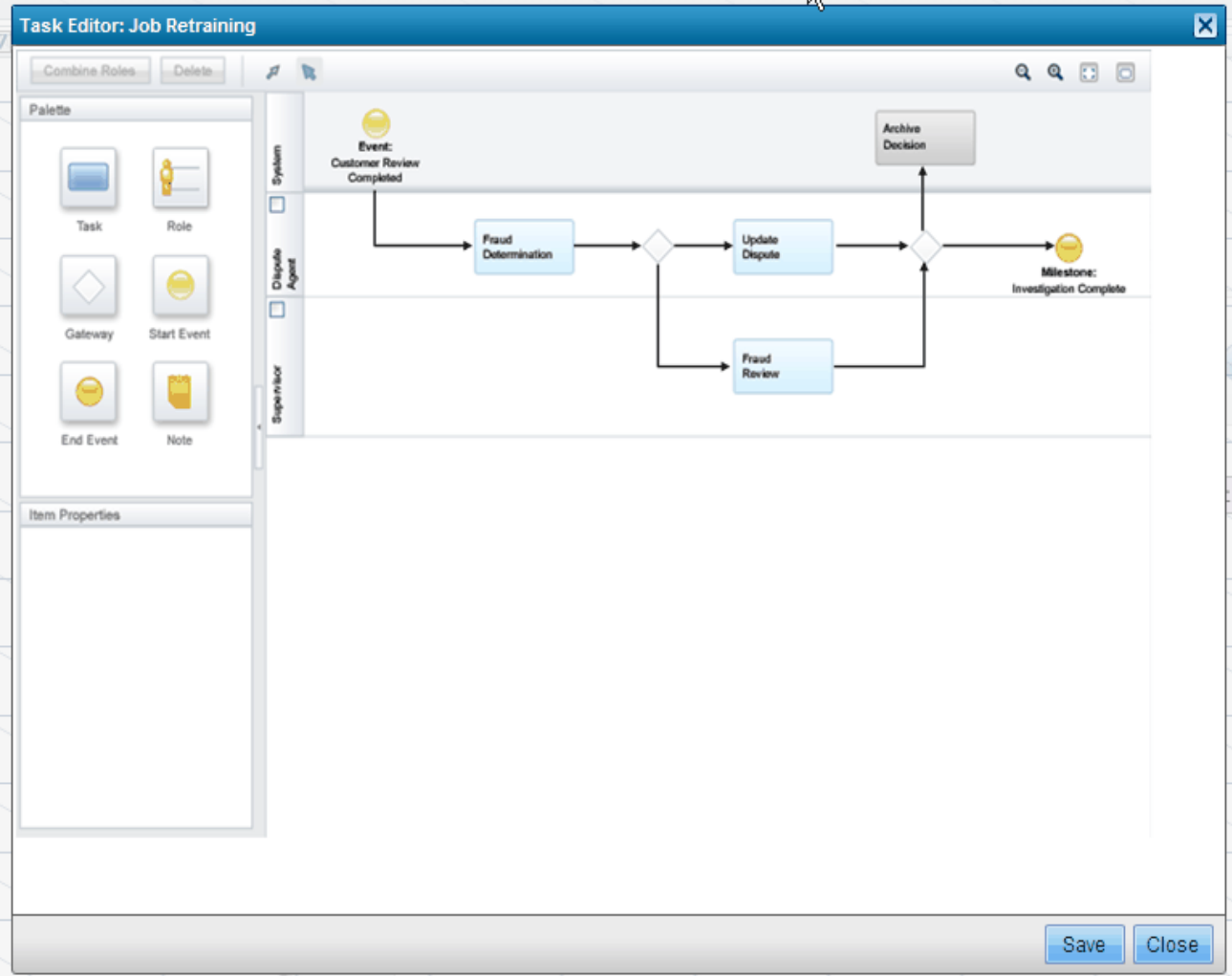
**Case templates shorten time to value !**



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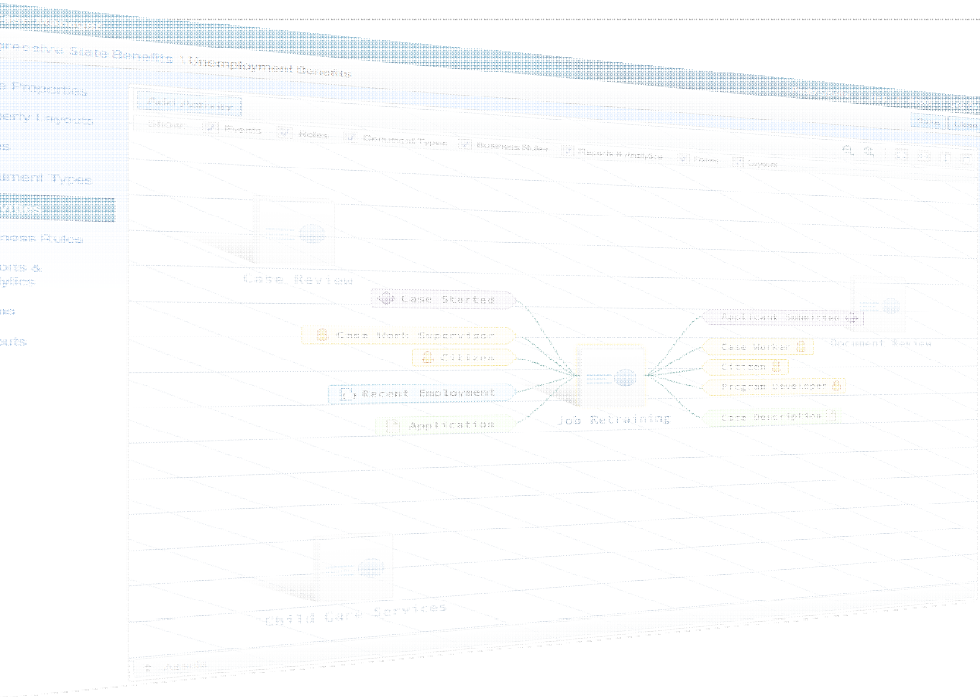
Add Activity

Show:  Events  Roles



Merchant Review

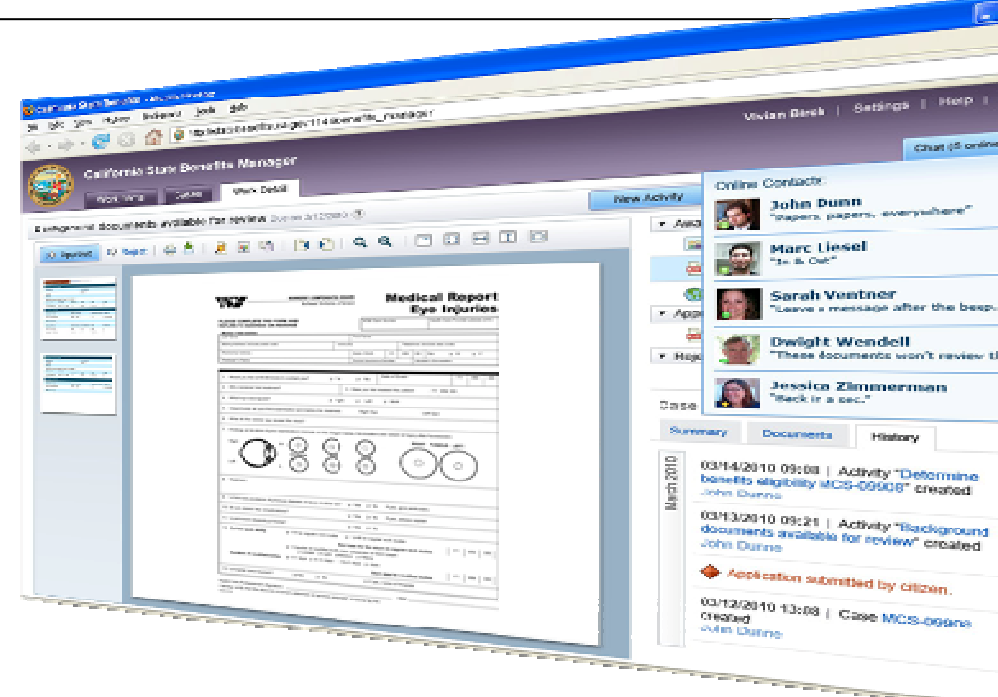
# Advanced Case Management



## Case Design for the Business

- Easy to use, wizard-driven
- Comprehensive across case assets
- Leverage templates for a fast start
- Significantly shortens time-to-value for case-style applications

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## Case Application User Experience

- Role-based and personalized
- Flexible and extensible
- Provides deep context for case work
- Brings people, process and information together to drive case progression and better outcomes



Work Items

Cases

Work Detail

Background documents available for review Due on 3/12/2010

New Activity

Approve

Reject

Save

g Review

exam report.pdf

\_09908\_background.pdf

loyment\_history.html

2009.bmp

MCS-09908

ary

History

Team

10

010 09:08 | Activity "Determine benefits by MCS-09908" created John Dunne

010 09:21 | Activity "Background documents available for review" created John

010 15:32 | IBM SPSS Predictive Score generated - Low likelihood of fraud in this

010 13:08 | Case MCS-09908 created Dunne



**Medical Report Eye Injuries**

PLEASE COMPLETE THIS FORM AND RETURN TO ADDRESS ON REVERSE

DATE OF INJURY: 3/3/09 DATE OF REPORT: 3/3/09

Worker Information: NAME: POLSKA, WITOLD; TITLE: CDUWVS; PHONE: 202-233-1234; EXT: 202-233-1234; ADDRESS: 1234 5th St NW, Washington, DC 20004; EMPLOYEE NUMBER: 202029

1. Would you like a WCB Doctor to examine you? Yes No Date of Exam: acdf

2. Why received this treatment? 3. Date you first treated the injury: 11/11/08

4. Which eye was injured? Right Left Both

5. How long has your eye been examined and treated? Right Eye Left Eye

6. What did the worker say caused the injury?

7. Drawings of the head of your injured employee on the diagram below. The number and extent of injury after examination.

8. Treatment: Heard was way better than while in all ways.

9. Is there any evidence of previous disability in injury in other part? Yes No If yes, give percentage

10. Do you expect any complications? Yes No If yes, please explain

11. Is permanent disability present? Yes No

12. Expected work ability: Full for regular work duties; Full for regular work duties; Partial for the return to regular work duties; Unable to perform any work duties; Unable to perform any work duties.

13. Is hospital care required? Yes No If yes, name of hospital

Health Care Professional's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

I hereby certify that the above is a correct statement of services personally rendered by the worker.

New Activity

Approve

Reject

Save

Close

Mozilla Firefox: IBM Edition

http://snjgsa.ibm.com/~rbtlee/public/ACM/live/R



**John Dunn**  
Case Work Supervisor

- Vivian Birch** Hey John, got a quick sec? 12:56:52 PM
- John Dunn** Sure, what's on your mind? 12:56:55 PM
- Vivian Birch** I am starting to think there might be some discrimination in the Tracy McShay case re her vision impairment 12:56:57 PM
- John Dunn** Interesting - go ahead and check it with legal 12:56:59 PM

Rich text editor toolbar with icons for bold (b), italic (i), underline (u), undo (AA), redo (AA), link (A), text (T), insert image (img), and other functions.

Done

### Medical Report Eye Injuries

WORKER COMPENSATION BOARD  
Business Services and Support

PLEASE COMPLETE THIS FORM AND RETURN TO ADDRESS ON REVERSE

Date of Injury: 3/3/09 Date of Exam: 3/3/09

Worker Information: Name: POLK, WANDA; Job Title: acsf; Employer: IBM; Address: 2000 N. 1st St., Chicago, IL 60642; Phone: 312.235.1000

1. Did you see a MD or Doctor to treat you?  Yes  No Date of Exam: acsf

2. Why did you need treatment?  Eye pain  Eye redness  Eye tearing  Eye discharge  Eye irritation  Eye swelling  Eye bruising  Eye laceration  Eye foreign body  Eye trauma  Eye infection  Eye inflammation  Eye injury

3. Which eye was injured?  Right  Left  Both

4. Visual Acuity (at your last examination and before the treatment): Right Eye: Left Eye:

5. What did the doctor say caused the injury?

6. Drawings of the head of your eye (frontal, profile, and back views) showing the location and extent of injury, after examination.

7. Treatment: Heard was way better than acsf in all ways.

8. Is there any evidence of previous disability or injury in either eye?  Yes  No If yes, give particulars:

9. Do you expect any complications?  Yes  No If yes, please explain:

10. Is permanent disability probable?  Yes  No

11. Expected work ability:  Full for regular work duties  Full for regular work duties  Limited for the return to regular work duties  Unable to return to regular work duties

12. Is regular care required?  Yes  No If yes, name of hospital:



# IBM Advanced Case Management



**Advanced Case Management User Experience**  
compelling and attractive UIs uniting business and IT  
to drive better case outcomes

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# Compliance enabled to manage risk



**Contents, histories, and forms can all be records managed and discovered for regulatory and legal requirements**

**Full audit trails (histories) are maintained for cases to track decision making and case information developed**

**Even collaborative activities can be recorded and managed as part of a case**



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# IBM partners for vertical case management solutions



- Over 500 Business Partner solutions are listed in our Industry Solutions Catalog.
- Over 200 of these solutions exist to address industry specific issues relative to case management in all its forms.



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<http://www-01.ibm.com/software/data/information-agenda/catalog/>

# Example of IBM ECM partners with case management solutions



en – Cross, Legal Doc & Hold Process Mgr

NIT – Cross, ECLISO

l – Healthcare, Credentialing

l – E&U, NERC Compliance

l – Banking, Enterprise Originations

amatics – Ins, New Bus Processing

huff – Employee On-Boarding

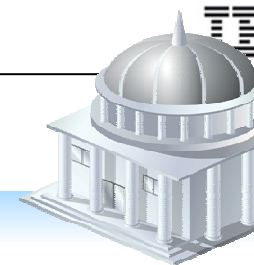
Pro – Public Sector, GoPro

- HCL America – Public Sector, iGOVERN
- HCL America – Banking, Card Originations
- enChoice – Cross, KwikWork Suite
- IMC – E&U, Rate Case Submission Mgmt
- Ovations – Cross, OvaFlo
- Pyramid – Banking, PCX, PLX, PIX, SmarterLending
- BPA Group – Cross, Meeting Manager
- TriTek – Insurance, Trans@ction Express for P&C Claims



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# GOVERNMENT: Social Benefit Eligibility & Administration



## Business Problems

### Changing Regulations

Terms and conditions for eligibility are changed by law and always subject to changes

### Inconsistent data

Data about citizens kept in various offices makes eligibility verification almost impossible and certainly inconsistent

### Inconsistent Service

Qualifying citizens are not being treated the same way for each comparable case due to inconsistencies in the process

## Solution Needed

- Central repository  
for all citizen information available to all branches and offices eliminating redundant information
- Flexible Rules  
Leveraging a rules engine for eligibility check (scoring criteria) keeping it separate from the process allowing for rapid adjustment to new laws and regulations
- Consistent Process  
to ensure equal and timely service/payment to all eligible citizens

## Outcome

### • Case Mgt Components

*FileNet Content Manager  
FileNet BPM  
WebSphere ILOG JRules*

### • **JUNTA DE CASTILLA Y LEÓN**

*The regional administration is no longer able to comply with the new law administering social services*

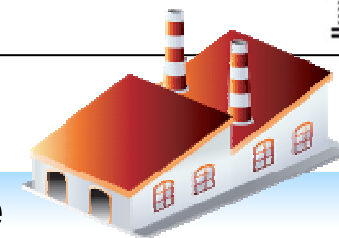
*Each eligible citizen is treated equally*

*Time to provide services to citizens has been reduced*



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# UTILITIES: Facility Construction and Management



## Business Problems

### Delayed Maintenance

Construction/maintenance orders not delayed significantly; workers have no on-site access to view or update information about regulations, building codes, work orders, building plans

### High risk of failure

Commission critical business processes are heavily reliant on paper documents

### Separate Systems

Departments run separate systems resulting in inability to provide complete case documentation

## Solution Needed

- Electronic case information  
eliminating paper, allowing office staff as well as on-site workers complete and up-to-date access to all documents
- Integrate legacy systems  
In order to create a 360° view of the maintenance order the staff needs full access to legacy systems in a combined view
- Track work orders  
To ensure timely response to city's work orders a BPM solution is needed to track and progress every case

## Outcome

### • Case Mgt Components

*Tritek Trans@ction eXpress  
FileNet Content Manager  
FileNet BPM  
Microsoft BizTalk*

### • **CONSOLIDATED EDISON**

*On-site construction specialists access, update the most recent documents in real-time with laptops and collaborate with office employees eliminating the risk of losing paper and costly maintenance delays.*

*Process optimization and providing full access to all information at all times resulted in an ROI of \$500*



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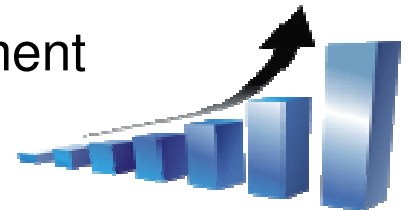


# Why IBM for Advanced Case Management?



- **Years of experience in case management**

- Thousands of customers already using IBM for case management
- Analysts support IBM leadership (Gartner, Forrester)



- **Strong partner network**

- 200+ Software ValueNet Partner solutions today cover case management solutions in many verticals



- **Complete solution**

- IBM is uniquely positioned to provide a breadth of capabilities to cover every aspect of Advanced Case Management



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For More Information...



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IBM Advanced Case Management:

- <http://www-01.ibm.com/software/data/advanced-case-management/>

United States [change]

IBM

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Welcome [IBM Sign in] [Register]

## Advanced Case Management

Optimize case outcomes  
with information, process and people

Overview IBM technologies Success stories

### Leverage industry best practices to optimize outcomes and empower business users

**What is advanced case management?**  
The advanced case management strategy from IBM unifies information, processes and people to provide a 360-degree view of the case. In addition to [context](#) and [process](#) management, it relies on [advanced analytics](#), [business rules](#), [collaboration and social software](#) to help drive more successful, optimized case outcomes. Moreover, advanced case management solutions help capture industry best practices in frameworks and templates to empower business users and accelerate return on investment.

**Why advanced case management by IBM?**  
Organizations face case management challenges that require

**Start in your industry**  
IBM has a long track record of delivering case management solutions. The IBM advanced case management strategy responds to industries in need of a smarter, more integrated way to handle their growing, increasingly complex caseloads and shrinking resources. Using leading solutions and proven best practices, IBM is equipped to assist organizations with almost any case management scenario, in nearly any domain.

With thousands of customers leveraging business process management to solve case management problems and hundreds of partners delivering case-style solutions, IBM has deep experience and success in this area.

We're here to help

Easy ways to get the answers you need.

Request a quote

E-mail IBM

Or call us at:  
877-426-3774  
Priority code:  
109HF03V



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# QUESTIONS?



in a complex world